

About Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Cardinal allows the Strategic Sourcing (SS) Buyer, to award bids by total, line(s), or group (lot). The initial event set up will determine the specific award features available when analyzing bid results.

The SS bid factor function enables you to evaluate events based on factors such as price, warranties offered, lead time, and product quality. Bid factors are questions bidders must answer about their products, services, or company. You set weightings for each bid factor, letting bidders know how much value you give to that portion of their bid. Price is by default the first bid factor of any event. The score depends on how close the answer to the bid factor comes to the ideal answer.

For additional instructions on the SS process, refer to the course titled **501 PR345 Strategic Sourcing**, job aids titled **501 PR345 Strategic Sourcing Event Awards** and **501 PR345 Strategic Sourcing Collaboration**, and the SS simulations, all of which are located on the Cardinal Project Website.

TABLE OF CONTENTS

Event Creation Basics:	2
Event Set Up Examples.....	3
Ex. 1: Factor Event Score Into = Total Score, with Header Weight	3
Ex. 2: Factor Event Score Into = Total Score, no Header Weight.....	6
Ex. 3: Factor Event Score Into = Line Score and Total Score.....	8
Ex. 5: Factor Event Score Into = Line Score, with Line Factor Weighting	11
Award Events:.....	16
Award 'By Total'	16
Event Creation – By Total.....	16
Enter Bids - By Total.....	19
Analyze Bids & Award Event – By Total.....	21
Award 'By Line'	24
Event Creation – By Line	24
Enter Bids – By Line	26
Analyze Bids & Award Event – By Line	27
Award 'By Group' (Lot)	31
Event Creation – By Group (Lot)	31
Enter Bids – By Group (Lot)	36
Analyze Bids & Award Event – By Group (Lot)	41

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards**Event Creation Basics:**

How you set up the event defines how the award is made; by **Total**, **Line** or **Group** / Lot. For additional instructions on creating events refer to the course titled **501 PR345 Strategic Sourcing**.

- During event creation under **Step 1: Define Event Basics** the **Event Settings and Options** hyperlink is used to establish bid requirements, event scoring, as well as, header and line factor weights, as applicable. Settings on this page include:

Bid Required On All Lines - Events may be setup to require a bid response on individual, or all, lines.

- 1 Factor Event Score Into** - Select to indicate that you want the system to factor the header score into the **Total Score** for the event or the individual **Line Score**.

- If **Total Score** is selected, the header score is factored into the total score of the event, which is calculated by adding the weighted line scores plus the weighted header score. Select this option if you intend to award the entire event to one bidder.
- If **Line Score** is selected, a header score bid factor will automatically be added to each line within an event. The line score will be calculated by adding the weighted scores of each line bid factor plus the weighted header score. Select this option if you intend to award different lines within the event to different bidders.

- 2 Header Weighting** - Enter a default weighting to determine how the system weighs the event header score in relation to the **Total** or **Line Score**.

- Weights applied at the header level apply to the overall event and to each line.
- **Header Weighting** defaults to 100 when the **Factor Event Score Into** of **Total Score** is selected.
- The **Header Weighting** is not pre-populated if you select **Line Score** or **Line Score and Total Score**, since you would be setting those weights.

- 3 Line Factor Weighting:**

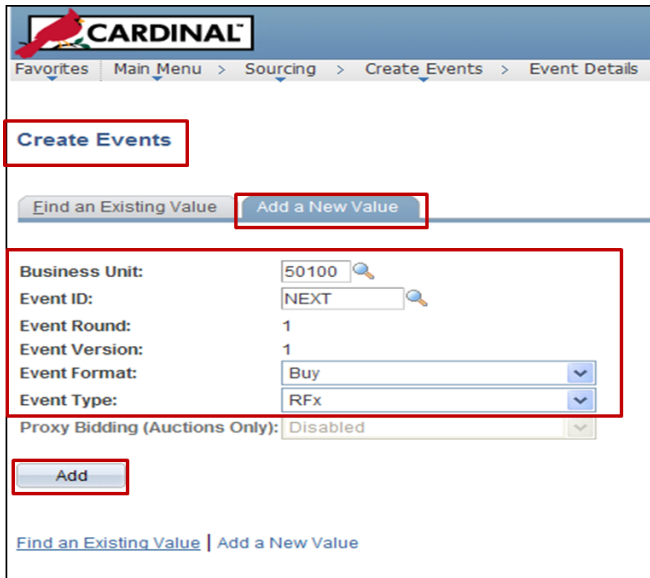
- The line item weighting, meaning how important that specific item or service is to the overall event.
- Bid factors are set up during the creation of the event. Bid factors are questions bidders must answer about their products, services, or company.
 - **Step 1: Define Event Basics** - The **Event Header Bid Factors** hyperlink is used to establish header bid factors that relate to the overall event.
 - **Step 2: Configure Line Items** - The **Line Items** hyperlink is used to establish line bid factors that relate to a specific line.
- Weighting is set for each bid factor. The weighting signifies how important a bid factor is to the overall event or line.
 - The combined weightings assigned to the event line(s) and the event header must total 100%. If no header weight is used, line weights equal to 100 are automatically assigned upon save. If you attempt to **Post** the event, and the sum of the weightings applied to the event lines and event header do not equal 100%, an error message will be displayed.
- The score depends on how close the answer to the bid factor comes to the ideal answer.

Event Set Up Examples

Ex. 1: Factor Event Score Into = Total Score, with Header Weight

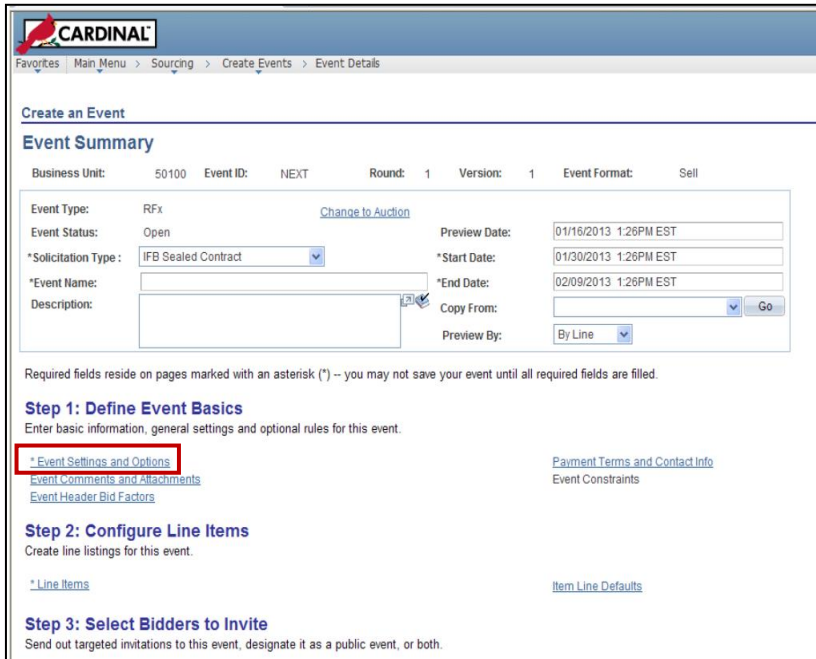
- 1 To add an event, use the **Create Events** page. Navigate to this page using the following path:

Main Menu > Sourcing > Create Events > Event Details



- 2 Select the **Add a New Value** tab.
- 3 Enter the fields as instructed in the course titled **501 PR345 Strategic Sourcing**.
- 4 Click **Add**. The **Create Event - Event Summary** page is displayed.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Sell

Event Type: RFx [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name:

Description:

Preview Date: 01/16/2013 1:26PM EST

*Start Date: 01/30/2013 1:26PM EST

*End Date: 02/09/2013 1:26PM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

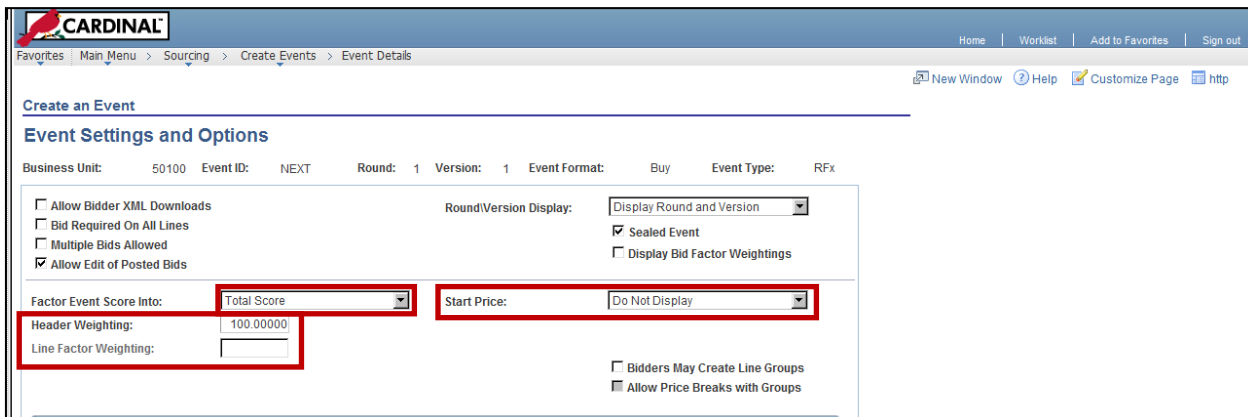
[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

- 5 Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink. The **Create Event - Event Settings and Options** page displays.



Create an Event

Event Settings and Options

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads

☐ Bid Required On All Lines

☐ Multiple Bids Allowed

☒ Allow Edit of Posted Bids

Round/Version Display: Display Round and Version

☒ Sealed Event

☐ Display Bid Factor Weightings

Factor Event Score Into: Total Score

Header Weighting: 100.00000

Line Factor Weighting:

Start Price: Do Not Display

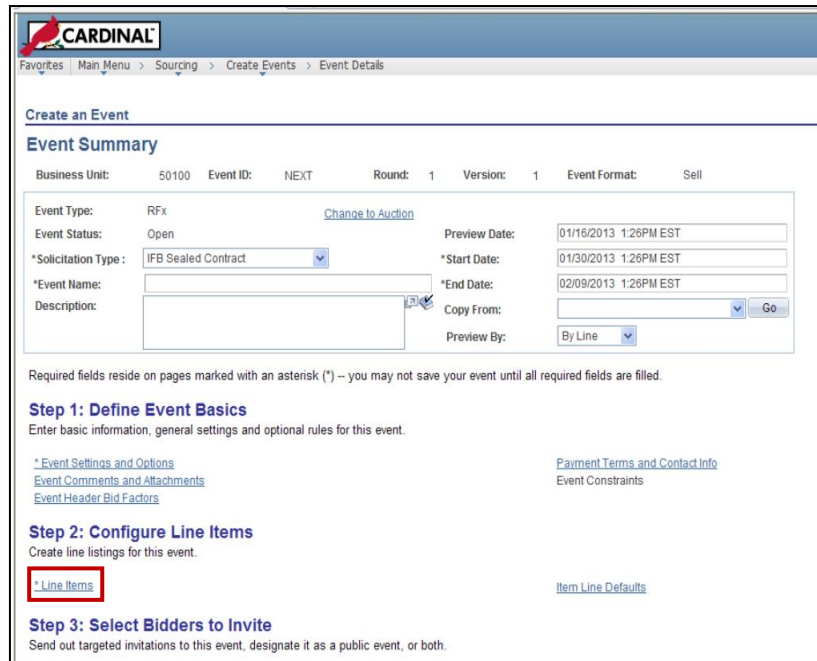
☐ Bidders May Create Line Groups

☐ Allow Price Breaks with Groups

4

- 6 Factor Event Score Into = Total Score
- 7 Header Weighting = 100
- 8 Line Factor Weighting = None
- 9 Start Price: Defaults to **Do Not Display**, we do not typically change the default, but you may.
- 10 Click on the **Save Event Changes** button.
- 11 Click the **Return to Event Overview** hyperlink. The **Create Event - Event Summary** page is displayed.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Sell

Event Type: RFX [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name:

Description:

Preview Date: 01/16/2013 1:26PM EST

*Start Date: 01/30/2013 1:26PM EST

*End Date: 02/09/2013 1:26PM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

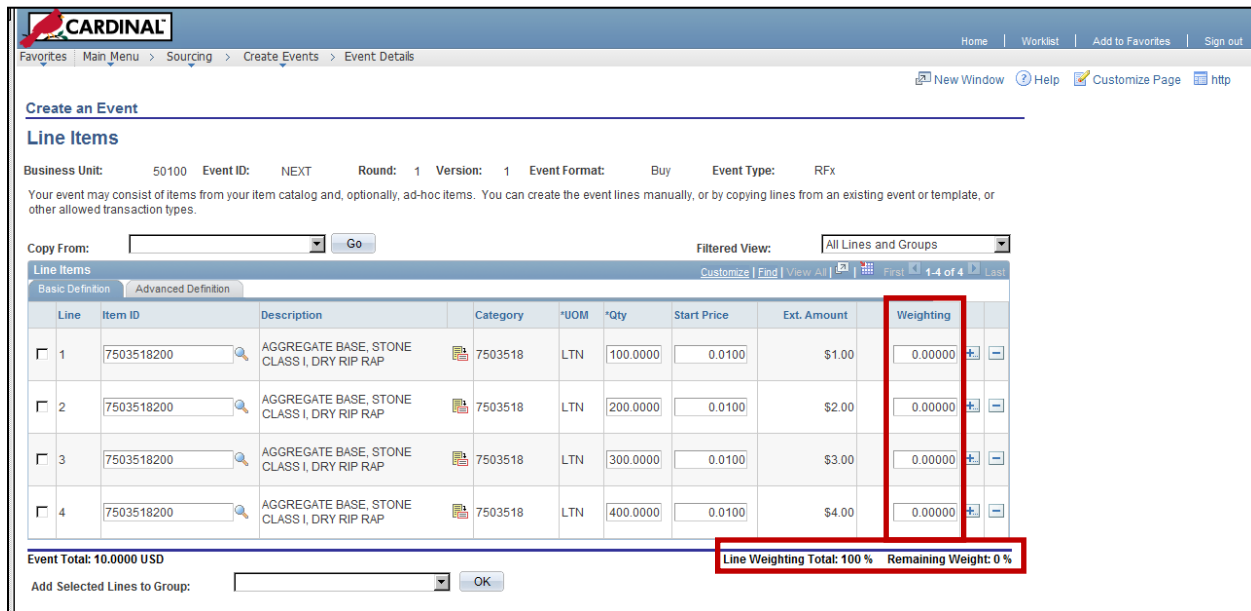
[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

12 Follow normal procedures to enter **Event Header Bid Factors** if necessary.

13 Under **Step 2: Configure Line Items**, click on the **Line Items** hyperlink. The **Create Event – Line Items** page displays.



Create an Event

Line Items

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Filtered View: All Lines and Groups

Line Items

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	100.0000	0.0100	\$1.00	0.00000
2	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	200.0000	0.0100	\$2.00	0.00000
3	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	300.0000	0.0100	\$3.00	0.00000
4	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	400.0000	0.0100	\$4.00	0.00000

Event Total: 10.0000 USD

Line Weighting Total: 100 % Remaining Weight: 0 %

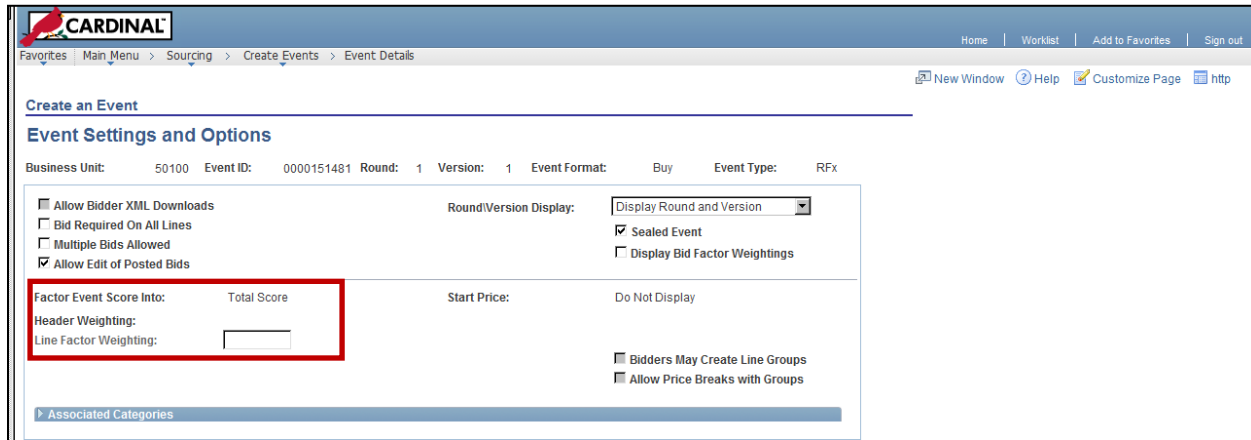
Add Selected Lines to Group: OK

14 Follow normal procedures to enter all the event lines, i.e., items. The **Remaining Weight** must equal **0%**.

15 If the sum of the event header and event line weights is not equal to 100, an error message will be displayed upon save. You must fix the sum of the weights to equal 100.

16 Complete normal event creation procedures then save and post the event. For additional instructions on creating events refer to the course titled **501 PR345 Strategic Sourcing**.

Ex. 2: Factor Event Score Into = Total Score, no Header Weight



CREATE AN EVENT

Event Settings and Options

Business Unit: 50100 Event ID: 0000151481 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids

Round/Version Display: Display Round and Version

☒ Sealed Event
☐ Display Bid Factor Weightings

Factor Event Score Into: Total Score
 Header Weighting: None
 Line Factor Weighting: None

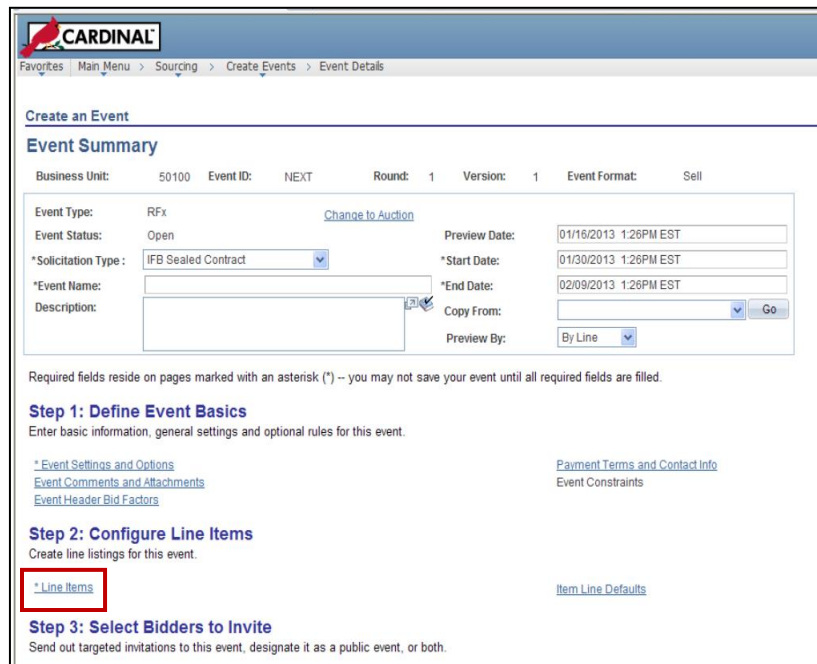
Start Price: Do Not Display

☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

[Associated Categories](#)

- 1 Follow the same steps as noted in Ex. 1 above, steps 1-5
- 2 **Factor Event Score Into = Total Score**
- 3 **Header Weighting = None**
- 4 **Line Factor Weighting = None**
- 5 **Start Price:** Defaults to **Do Not Display**, we do not typically change the default, but you may.
- 6 Click on the **Save Event Changes** button.
- 7 Click the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Sell

Event Type: RFX [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name:

Description:

Preview Date: 01/16/2013 1:26PM EST

*Start Date: 01/30/2013 1:26PM EST

*End Date: 02/09/2013 1:26PM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

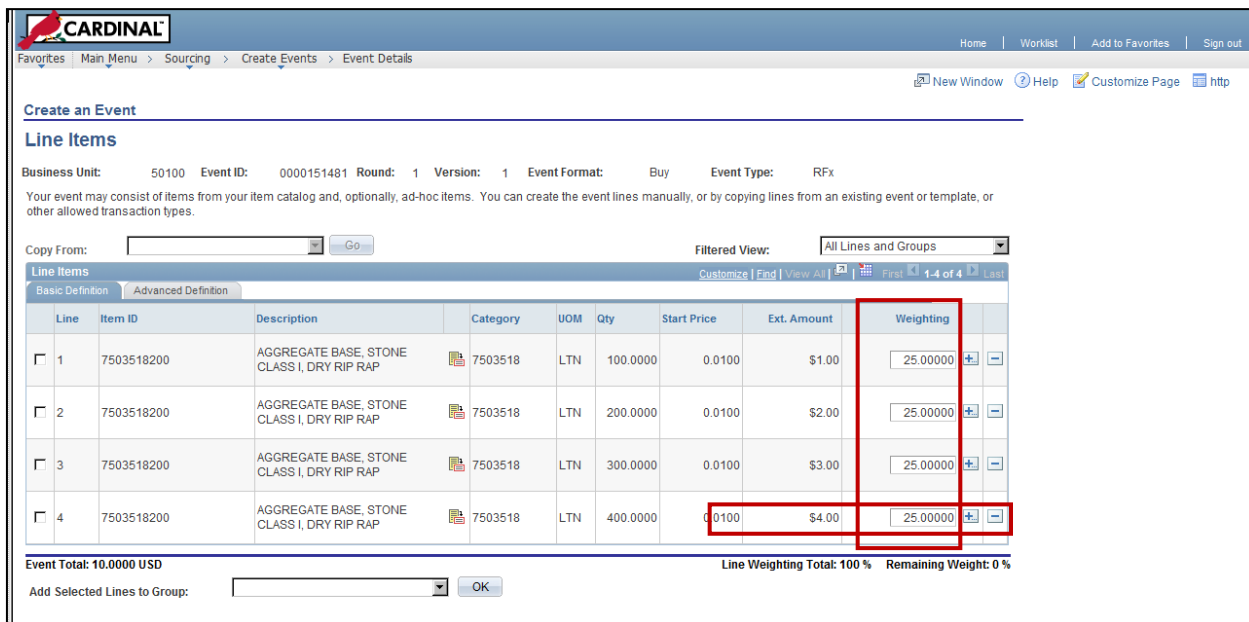
[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#) [Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

- 8 Follow normal procedures to enter **Event Header Bid Factors** if necessary.
- 9 Under **Step 2: Configure Line Items**, click on the **Line Items** hyperlink. The **Create Event – Line Items** page displays.
- 10 Follow normal procedures to enter all the event lines, i.e., items. In this example there are 4 lines, each equally



Create an Event

Line Items

Business Unit: 50100 Event ID: 0000151481 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Filtered View: All Lines and Groups

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
1	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	100.0000	0.0100	\$1.00	25.00000
2	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	200.0000	0.0100	\$2.00	25.00000
3	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	300.0000	0.0100	\$3.00	25.00000
4	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	400.0000	0.0100	\$4.00	25.00000

Event Total: 10.0000 USD

Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group:

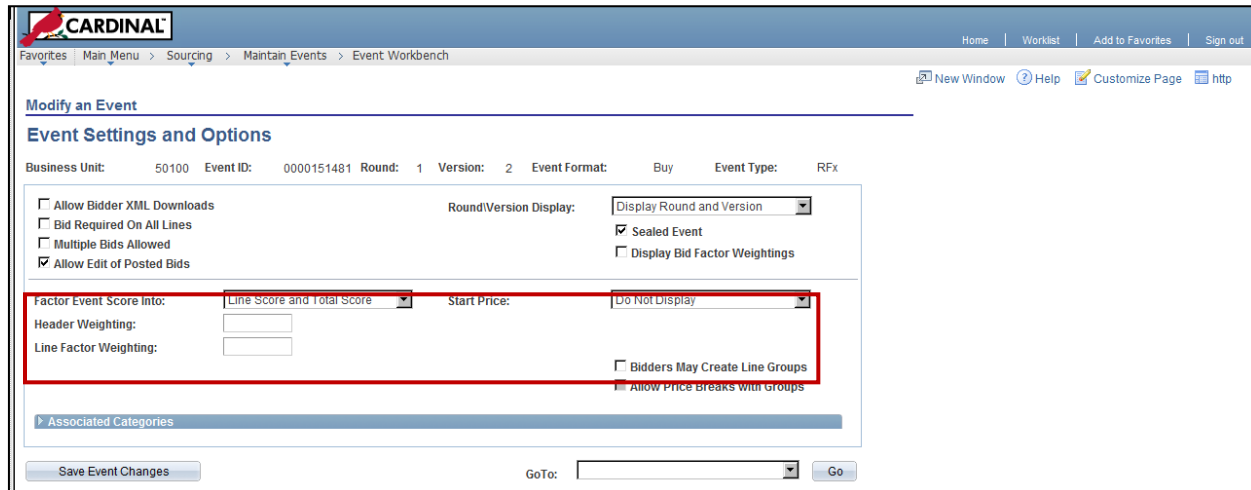
weighted at 25.00, resulting in a **Line Weighting Total** of **100%**. The **Remaining Weight** is equal to **0%**.

- 11 Complete normal event creation procedures, then save and post the event. For additional instructions on creating events refer to the course titled **501 PR345 Strategic Sourcing**.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

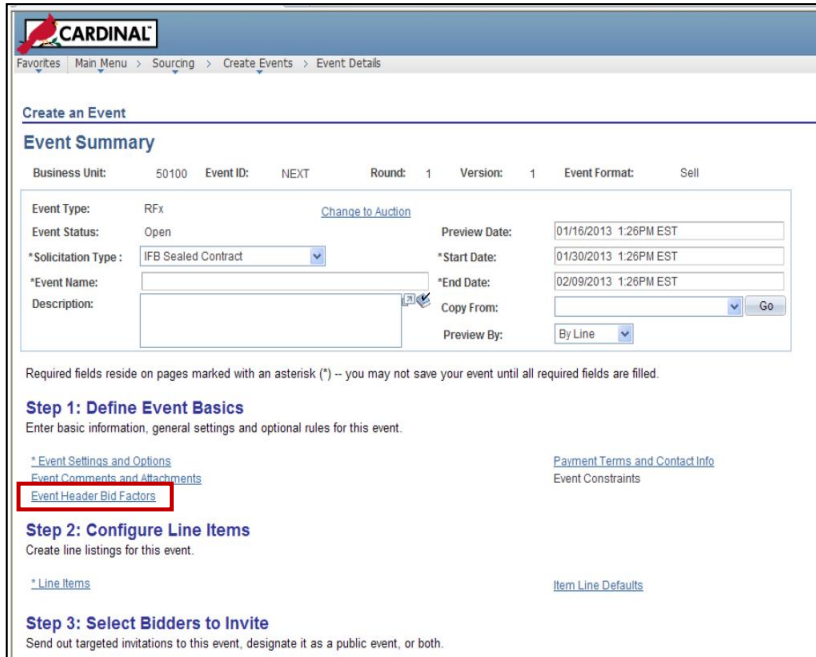
Ex. 3: Factor Event Score Into = Line Score and Total Score

- 1 Follow the same steps as noted in Ex. 1 above, steps 1-5

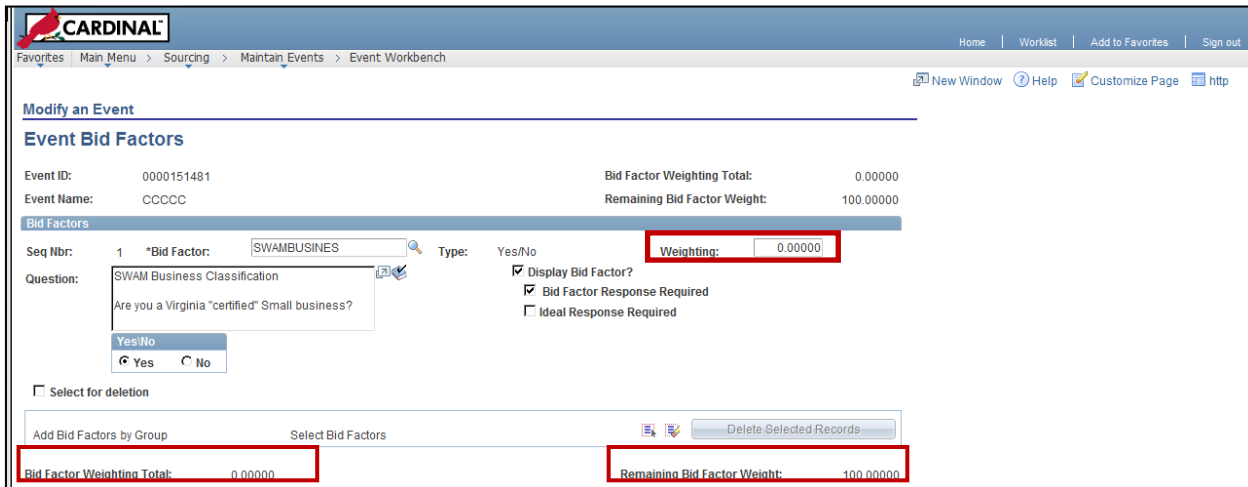


- 2 **Factor Event Score Into = Line Score and Total Score.** When selecting **Line Score and Total Score**, there must be a **Header Bid Factor**. If a bid factor is not added, upon your attempt to **Post**, a pop-up error message will be displayed.
- 3 **Header Weighting = None**
- 4 **Line Factor Weighting = None**
- 5 **Start Price:** Defaults to **Do Not Display**, we do not typically change the default, but you may.
- 6 Click on the **Save Event Changes** button.
- 7 Click the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



- 8 To set up a header bid factor(s), under **Step 1: Define Event Basics**, click on the **Event Header Bid Factors** hyperlink. The **Create an Event – Event Bid Factors** page displays.



- 9 **Weighting** - It is not necessary to insert a weight if only one header bid factor is entered.
- 10 Using the + icon you may enter multiple bid factors and weight each if desired.
- If the **Bid Factor Weighting Total** is equal to 000.00 then the **Remaining Bid Factor Weight** must equal 100.00.
 - If the **Bid Factor Weighting Total** is equal to 100.00 then the **Remaining Bid Factor Weight** must equal 000.00.
- 11 Click on the **Save Event Changes** button.
- 12 Click the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.

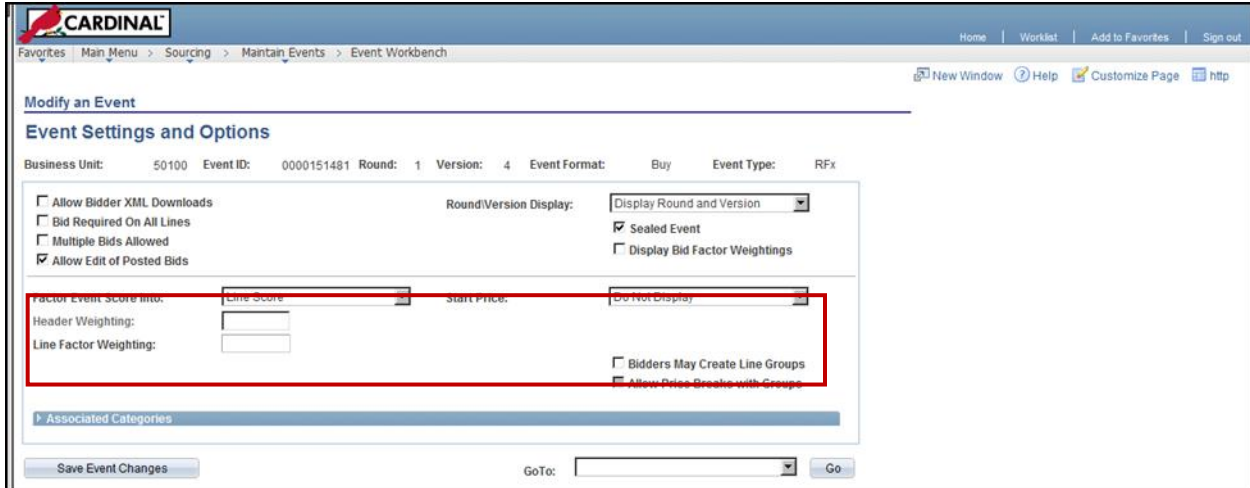
Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

13 Once you have added bidders, e.g., **Public Event**, and followed normal event creation steps, as documented in the course titled **501 PR345 Strategic Sourcing**, you may **Save** and **Post** the event. The **Event ID #** is generated and displayed. For additional instructions on creating events refer to the course titled **501 PR345 Strategic Sourcing**.

5

6 Ex. 4: Factor Event Score Into = Line Score, no Line Factor Weighting

1 Follow the same steps as noted in Ex. 1 above, steps 1-5.



The screenshot shows the 'Modify an Event' page in the CARDINAL system. The 'Event Settings and Options' section is active. Under 'Round/Version Display', 'Display Round and Version' is selected. In the 'Factor Event Score Into' section, 'Line Score' is selected for 'Factor Event Score Into' and 'Do Not Display' is selected for 'Start Price'. Other options include 'Allow Bidder XML Downloads', 'Bid Required On All Lines', 'Multiple Bids Allowed', 'Allow Edit of Posted Bids', 'Sealed Event', 'Display Bid Factor Weightings', 'Bidders May Create Line Groups', and 'Allow Price Breaks with Groups'. The 'Associated Categories' section is also visible at the bottom.

2 **Factor Event Score Into = Line Score**

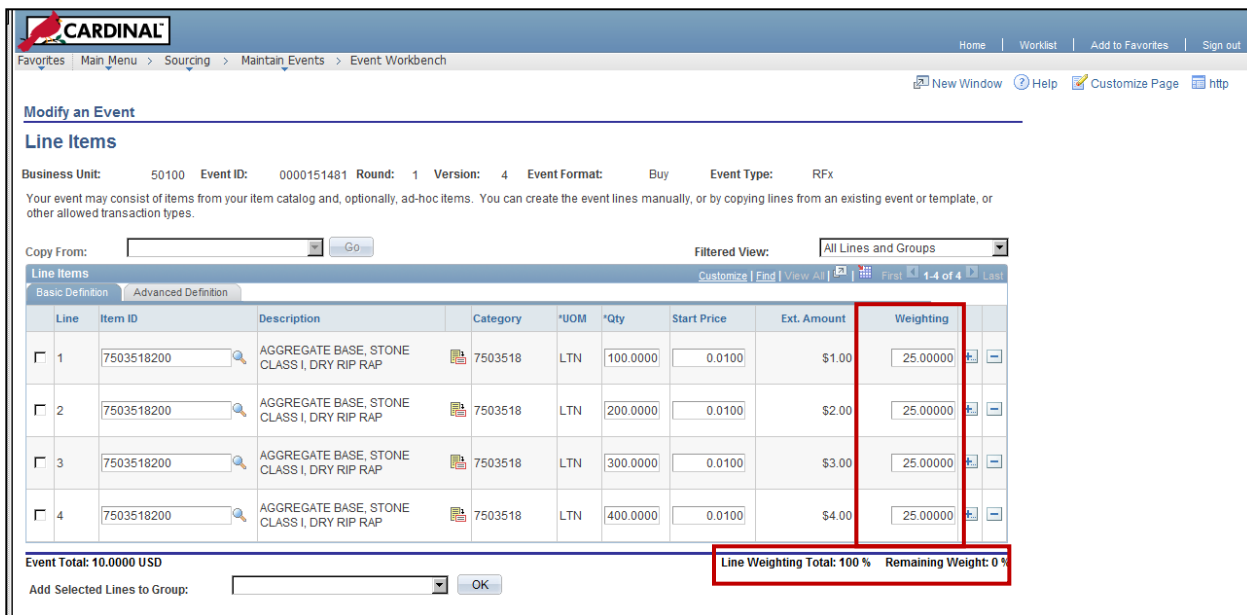
3 **Header Weighting = None**; If **Line Score** is selected above, the **Header Weighting** is not available.

4 **Line Factor Weighting - Line Factor Weighting** is available and may be used.

- a. **Line Factor Weighting** is specific to the overall event and added to each **Line** as a **Bid Factor**. If used, the total **Line Weighting Total** must = 100% with a **Remaining Weight** = 0%.

5 **Start Price**: Defaults to **Do Not Display**, we do not typically change the default, but you may.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Modify an Event

Line Items

Business Unit: 50100 Event ID: 0000151481 Round: 1 Version: 4 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Filtered View: All Lines and Groups

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
1	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	100.0000	0.0100	\$1.00	25.00000
2	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	200.0000	0.0100	\$2.00	25.00000
3	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	300.0000	0.0100	\$3.00	25.00000
4	7503518200	AGGREGATE BASE, STONE CLASS I, DRY RIP RAP	7503518	LTN	400.0000	0.0100	\$4.00	25.00000

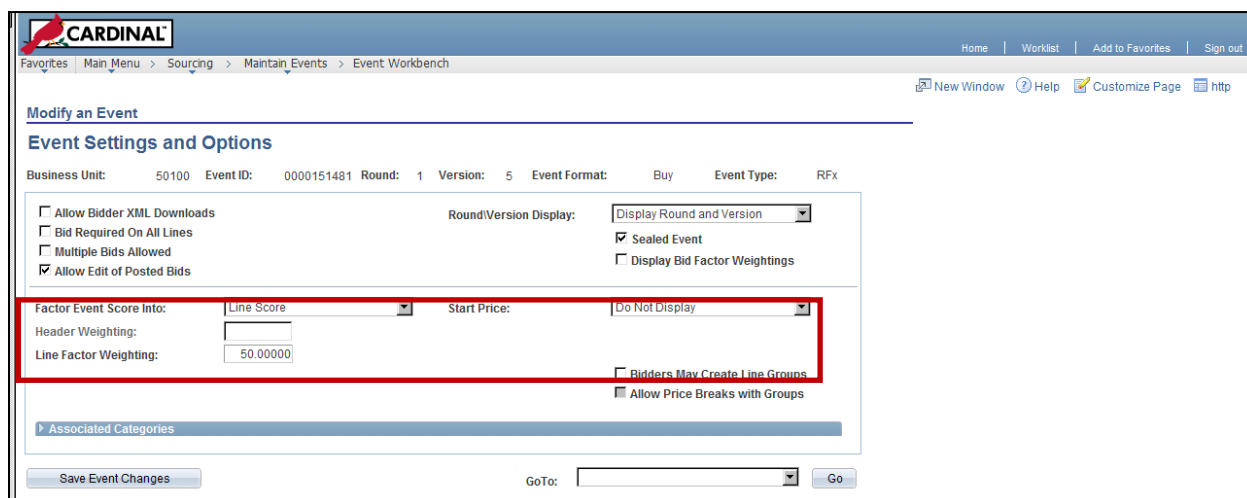
Event Total: 10.0000 USD

Line Weighting Total: 100% Remaining Weight: 0%

- Follow normal procedures to enter all the event lines, i.e., items.
- Weighting** - Enter a value to indicate the importance of the line item to the entire event. If you do not enter line weightings, each line item is weighted equally. In this example there are 4 lines, each equally weighted at 25.00, resulting in a **Line Weighting Total** of 100%. The **Remaining Weight** is equal to 0%.
- Once you have added bidders, e.g., **Public Event**, and followed normal event creation steps, as documented in the course titled **501 PR345 Strategic Sourcing**, you may **Save** and **Post** the event. The **Event ID** # is generated and displayed.

Ex. 5: Factor Event Score Into = Line Score, with Line Factor Weighting

- Follow the same steps as noted in Ex. 1 above, steps 1-5



Modify an Event

Event Settings and Options

Business Unit: 50100 Event ID: 0000151481 Round: 1 Version: 5 Event Format: Buy Event Type: RFX

☐ Allow Bidder XML Downloads Round/Version Display: Display Round and Version

☐ Bid Required On All Lines ☒ Sealed Event

☐ Multiple Bids Allowed ☐ Display Bid Factor Weightings

☒ Allow Edit of Posted Bids

Factor Event Score Into: Line Score Start Price: Do Not Display

Header Weighting: None

Line Factor Weighting: 50.00000

☐ Bidders May Create Line Groups

☒ Allow Price Breaks with Groups

Associated Categories

Save Event Changes

GoTo: Go

- Factor Event Score Into = Line Score
- Header Weighting = None

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

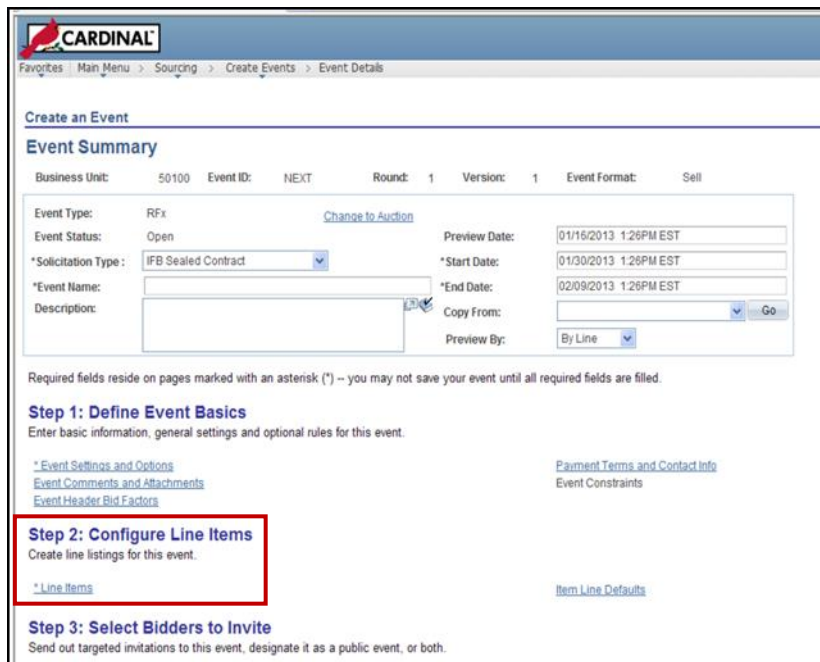
4 Line Factor Weighting = 50.00

- Line Factor Weighting** is specific to the overall event and added to each line as a **Header Bid Factor**.
- If **Line Factor Weighting** is used, the sum of all line bid factor weights must = 100. As a result you will need to modify the line Bid Factors to ensure they sum to 100.

5 Start Price: Defaults to **Do Not Display**, we do not typically change the default, but you may

6 Click the **Save Event Changes** button.

7 Click the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.



CREATE AN EVENT

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Sell

Event Type: RFX [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name:

Description:

Preview Date: 01/16/2013 1:26PM EST

*Start Date: 01/30/2013 1:26PM EST

*End Date: 02/09/2013 1:26PM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)
[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

8 Follow normal procedures to enter **Event Header Bid Factors** if necessary.

9 Under **Step 2: Configure Line Items**, click on the **Line Items** hyperlink. The **Create Event – Line Items** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Create an Event

Line Items

Business Unit: 50100 Event ID: 0000153653 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go Filtered View: All Lines and Groups

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1	7503518200	STONE, RIP RAP CLASS 1	7503518	LTN	3.0000	37.5000	\$112.50	0.00000
2	7503514000	AGGREGATE, FLY ASH AGGREGATE, FLY ASH	7503514	EA	1.0000	23.0000	\$23.00	0.00000

Event Total: 135.5000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group: OK

[Return to Event Overview](#) GoTo: Go

Save Event Changes

10 Follow normal procedures to enter all the event lines items.

11 Click on the **Save Event Changes** button. Upon save, a warning message will be applied to each line for corrective action and a pop-up message noting the lines needing corrective action will appear.

Create an Event

Line Items

Business Unit: 50100 Event ID: 0000153653 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go Filtered View: All Lines and Groups

Line	Item ID	Description
1	7503518200	STONE, RIP RAP CLASS 1
2	7503514000	AGGREGATE, FLY ASH AGGREGATE, FLY ASH

Event Total: 135.5000 USD

Add Selected Lines to Group:

[Return to Event Overview](#) GoTo: Go

Save Event Changes

Message

Bid Factor SaveEdit errors encountered. (18058,242)

There are bid factor edit errors for this event.
All SaveEdit errors must be addressed prior to posting an event.

Would you like to fix the errors now?

Yes No

12 Click Yes.

13 A second pop-up message will appear notifying you about a Bid Factor weight issue.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Message

Total Bid Factor weight for line 1 does not equal 100%.

Bid Factor weighting assigned to lines must equal 100%. Please adjust line bid factor weights accordingly.

OK

14 Click **OK**. The **Create Event – Line Items** page displays.

Create an Event

Line Items

Business Unit: 50100 Event ID: 0000153653 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.



Copy From: Go

Filtered View: All Lines and Groups

Line Items

Basic Definition

Advanced Definition

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints			
<input type="checkbox"/> 1	7503518200	STONE, RIP RAP CLASS 1	STATE	-	Details	Bid Factors	No			
<input type="checkbox"/> 2	7503514000	AGGREGATE, FLY ASH AGGREGATE, FLY ASH	STATE	-	Details	Bid Factors	No			

Event Total: 135.5000 USD

Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group: OK

[Return to Event Overview](#)

GoTo: Go

Save Event Changes

15 Click on the **Advanced Definition** tab.

16 A yellow warning icon is displayed on the lines that need to be updated.

17 Click on the **Bid Factors** hyperlink for each line with a warning icon. The **Create an Event – Line Bid Factors** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Sourcing > Maintain Events > Event Workbench

New Window | Help | Customize Page | http

Modify an Event

Line Bid Factors

Line: 1
Item ID: 7503518200
Description: AGGREGATE BASE, STONE CLASS I, DRY RIP RAP

Bid Factors

Seq Nbr	Bid Factor	Type	Weighting
1	BID_PRICE Question: What is your bid price?	Monetary	100.00000
Best: 0.000000 Worst: 0.010000			
<input type="checkbox"/> Select for deletion <input type="checkbox"/> Display Bid Factor <input type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required			
2	HEADER Question: Event Header into overall Line score.	Numeric	50.00000
Best: 1.000000 Worst: 0.000000 UOM: EA			
<input type="checkbox"/> Select for deletion			

Add Bid Factors by Group | Select Bid Factors | Delete Selected Rows

Bid Factor Weighting Total: 150.00000
Remaining Bid Factor Weight: -50.00000

OK | Cancel | Refresh

18 The **Bid Factor Weighting Total** does not equal 100 and the **Remaining Bid Factor Weight** does not equal 0.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Create an Event

Line Bid Factors

Line: 1

Bid Factor Weighting Total: 150.00000

Item ID: 7503518200

Remaining Bid Factor Weight: -50.00000

Description: STONE, RIP RAP CLASS 1

Bid Factors

Seq Nbr: 1	Bid Factor: BID_PRICE	Type: Monetary	Weighting: 50.00000	+ -
<div>Question: What is your bid price?</div> <div>Best: 0.000000 Worst: 37.500000</div>				
<input type="checkbox"/> Display Bid Factor <input type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required				
<input type="checkbox"/> Select for deletion				

Seq Nbr: 2	Bid Factor: HEADER	Type: Numeric	Weighting: 50.00000	+ -
<div>Question: Event Header into overall Line score.</div> <div>Best: 1.000000 Worst: 0.000000 UOM: EA</div>				
<input type="checkbox"/> Display Bid Factor <input type="checkbox"/> Bid Factor Response Required <input type="checkbox"/> Ideal Response Required				
<input type="checkbox"/> Select for deletion				

[Add Bid Factors by Group](#)
[Select Bid Factors](#)
[Delete Selected Rows](#)

Bid Factor Weighting Total: 150.00000

Remaining Bid Factor Weight: -50.00000

OK

Cancel

Refresh

- 19 Adjust the **Bid Factors Weighting** so their sum, i.e., **Bid Factor Weighting Total**, equals 100.000. By default the **Remaining Bid Factor Weight** will equal 0.
- 20 Click **OK**. The **Bid Factor Weighting Total** and **Remaining Bid Factor Weight** are recalculated and the **Create Event – Line Items** page displays.
- 21 Once you have added bidders, e.g., **Public Event**, and followed normal event creation steps, as documented in the course titled **501 PR345 Strategic Sourcing**, you may **Save** and **Post** the event. The **Event ID #** is generated and displayed.

Award Events:

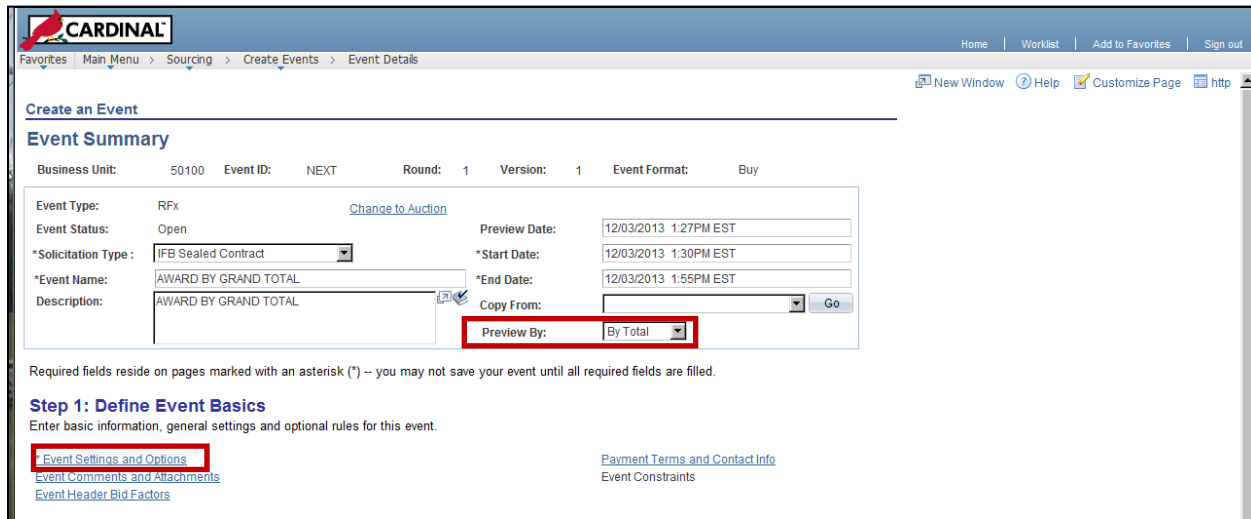
Once you have analyzed bids and selected the best bid, Strategic Sourcing enables you to award the winning bid.

Award 'By Total'

Event Creation – By Total

- 1 To award an event by total some basic set up must be done during the creation of the event. From Ex. 1 above follow steps 1-4 to access the **Create an Event – Event Summary** page.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name: AWARD BY GRAND TOTAL

Description: AWARD BY GRAND TOTAL

Preview Date: 12/03/2013 1:27PM EST

*Start Date: 12/03/2013 1:30PM EST

*End Date: 12/03/2013 1:55PM EST

Copy From: [Dropdown] Go

Preview By: By Total

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[*Event Settings and Options](#)

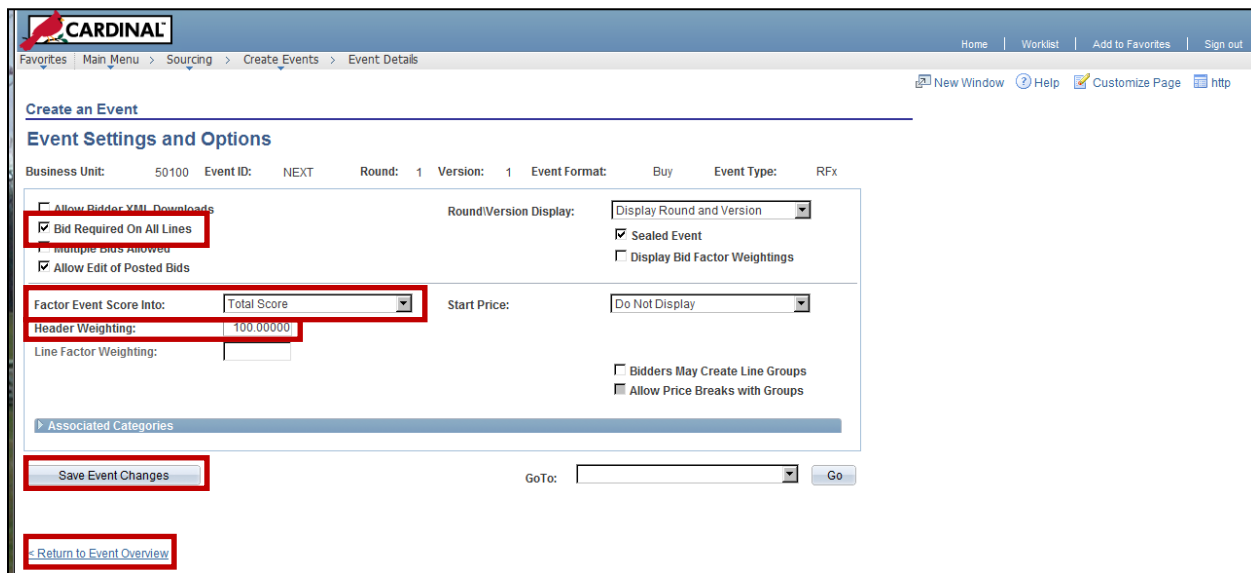
[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

Event Constraints

- 2 Set the **Preview By = By Total**.
- 3 Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink. The **Event Settings and Options** page is displayed.



Create an Event

Event Settings and Options

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder YML Downloads

☒ Bid Required On All Lines

☐ Multiple bids Allowed

☒ Allow Edit of Posted Bids

Round/Version Display: Display Round and Version

☒ Sealed Event

☐ Display Bid Factor Weightings

Factor Event Score Into: Total Score

Start Price: Do Not Display

Header Weighting: 100.00000

Line Factor Weighting: [Input Field]

☐ Bidders May Create Line Groups

☐ Allow Price Breaks with Groups

Associated Categories

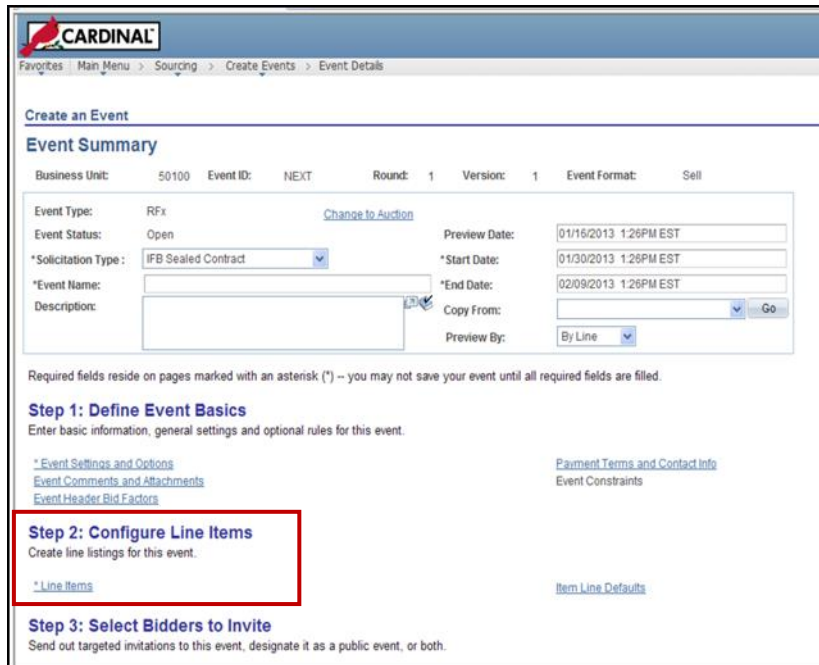
Save Event Changes

GoTo: [Dropdown] Go

[Return to Event Overview](#)

- 4 Select the **Bid Required On All Lines** checkbox.
- 5 **Factor Event Score Into = Total Score**
- 6 **Header Weighting = 100.0000**
- 7 Click on the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Sell

Event Type: RFX [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name:

Description:

Preview Date: 01/16/2013 1:26PM EST

*Start Date: 01/30/2013 1:26PM EST

*End Date: 02/09/2013 1:26PM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

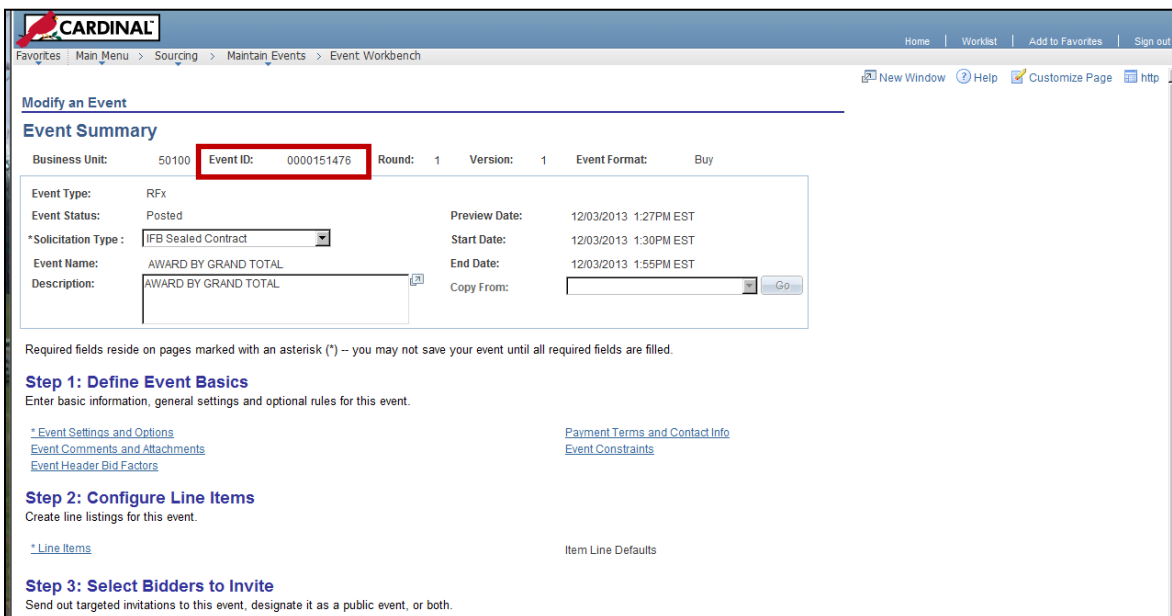
Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

- 8 Follow normal procedures to enter **Event Header Bid Factors** if necessary.
- 9 Under **Step 2: Configure Line Items**, click on the **Line Items** hyperlink. The **Create Event – Line Items** page displays.
- 10 Follow normal procedures to enter all the event lines, i.e., items. These will be totaled for the bid.
- 22 Click on the **Save Event Changes** button. The **Event ID #** is generated.
- 11 Click on the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page will display.



Modify an Event

Event Summary

Business Unit: 50100 Event ID: 0000151476 Round: 1 Version: 1 Event Format: Buy

Event Type: RFX

Event Status: Posted

*Solicitation Type: IFB Sealed Contract

Event Name: AWARD BY GRAND TOTAL

Description: AWARD BY GRAND TOTAL

Preview Date: 12/03/2013 1:27PM EST

Start Date: 12/03/2013 1:30PM EST

End Date: 12/03/2013 1:55PM EST

Copy From:

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

- 12 The **Event ID #** is displayed.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

- 13** Once you have added bidders, e.g., **Public Event**, and followed normal event creation steps, as documented in the course titled **501 PR345 Strategic Sourcing**, you may **Save** and **Post** the event.

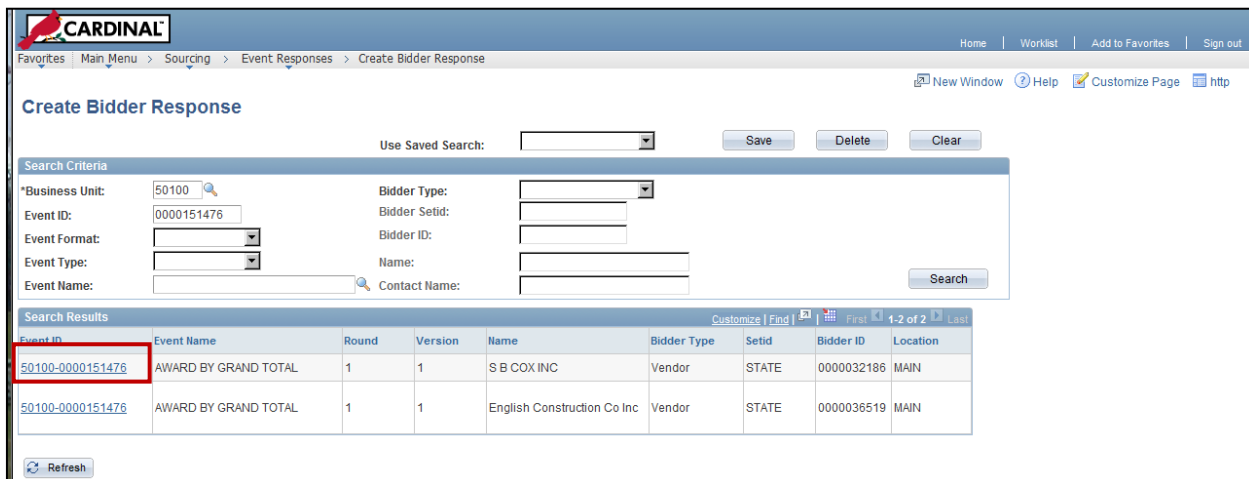
Enter Bids - By Total

The system allows for bid responses to be entered once the event's **Start Date** has passed and prior to its **End Date**. Generally, VDOT business processes require that bidders and bids be entered in the system after the event's **End Date**. Therefore, the Bid Processor must create a new version of the event with an extended **End Date** in order to open a window of time for bidder and bid response entry into Cardinal. Summary level instructions for entering bids are to follow. For additional instructions on entering bids refer to the course titled **501 PR345 Strategic Sourcing**.

- 14** To enter bids, navigate to the **Create Bidder Response** page using the following path:

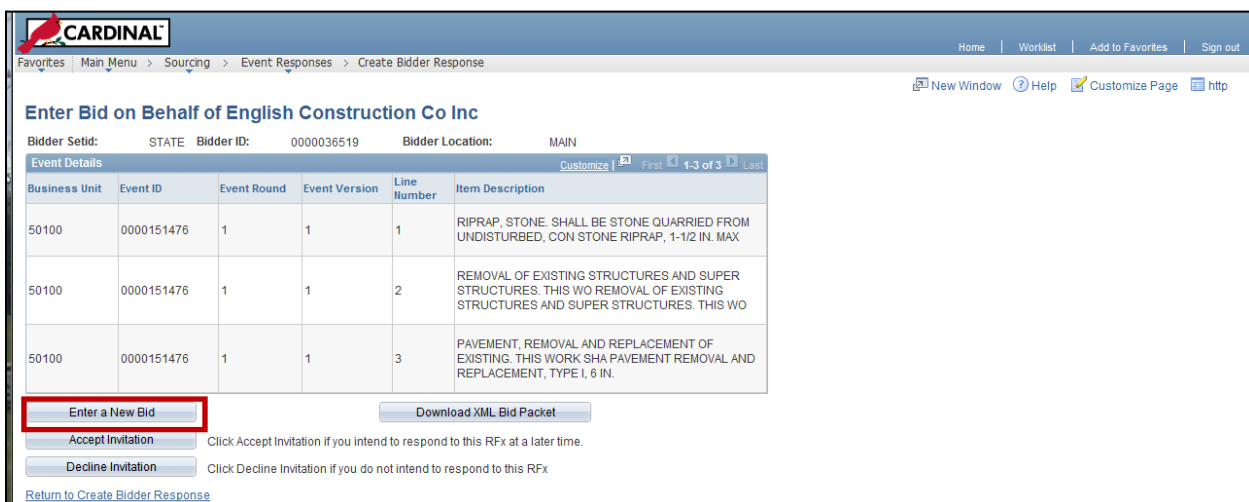
Main Menu > Sourcing > Event Responses > Create Bidder Response

- 15** On this page you will enter search criteria for the event you want to enter bids on. Click **Search**. The event and invited bidders are displayed.



Event ID	Event Name	Round	Version	Name	Bidder Type	Setid	Bidder ID	Location
50100-0000151476	AWARD BY GRAND TOTAL	1	1	S B COX INC	Vendor	STATE	0000032186	MAIN
50100-0000151476	AWARD BY GRAND TOTAL	1	1	English Construction Co Inc	Vendor	STATE	0000036519	MAIN

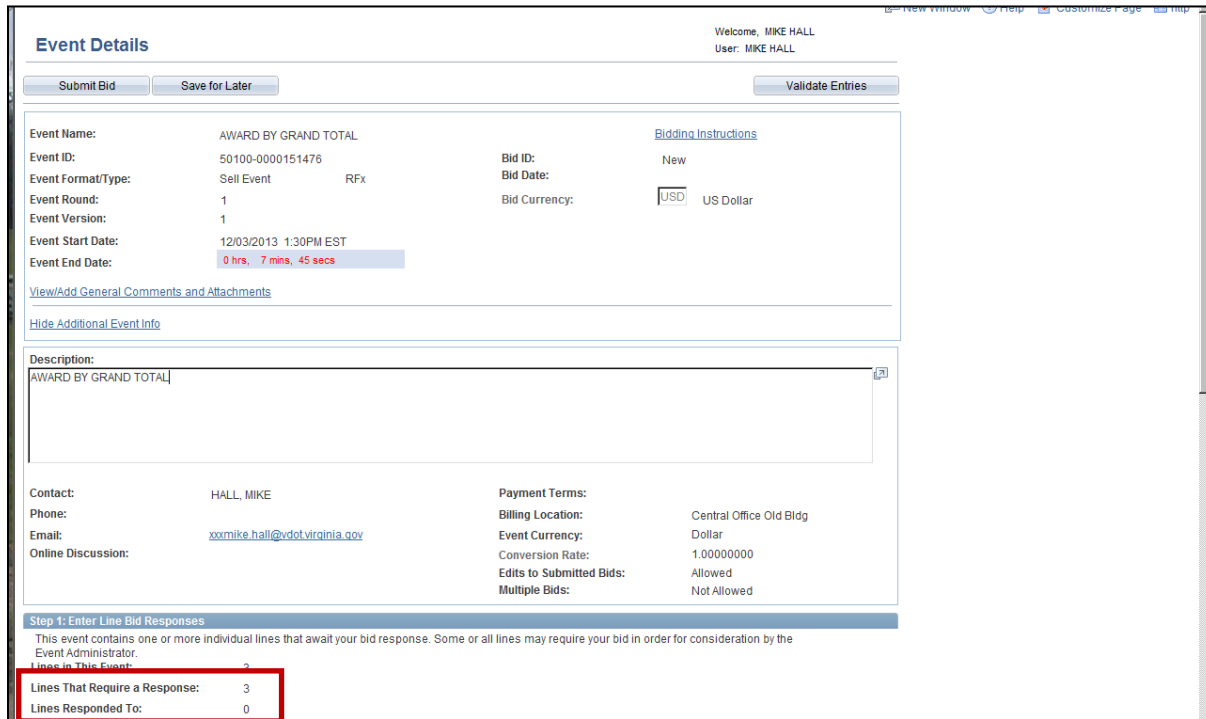
- 16** To select a bidder, click on the **Event ID** hyperlink on the row where the bidder's name is displayed. The **Enter Bid on Behalf of XXX** page is displayed for the Bidder you selected.



Business Unit	Event ID	Event Round	Event Version	Line Number	Item Description
50100	0000151476	1	1	1	RIPRAP, STONE. SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX
50100	0000151476	1	1	2	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO
50100	0000151476	1	1	3	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

- 17** Click on the **Enter a New Bid** button. The **Event Details** page is displayed and the Bid Processor will enter the bid on behalf of the vendor.



Event Details

Welcome, MIKE HALL
User: MIKE HALL

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

Event Name: AWARD BY GRAND TOTAL [Bidding Instructions](#)

Event ID: 50100-0000151476 Bid ID: New

Event Format/Type: Sell Event RFx Bid Date:

Event Round: 1 Bid Currency: US Dollar

Event Version: 1

Event Start Date: 12/03/2013 1:30PM EST

Event End Date: 0 hrs, 7 mins, 45 secs

[View/Add General Comments and Attachments](#)

[Hide Additional Event Info](#)

Description:
AWARD BY GRAND TOTAL

Contact: HALL, MIKE
Phone:
Email: xxmike.hall@vdot.virginia.gov
Online Discussion:

Payment Terms:
Billing Location: Central Office Old Bldg
Event Currency: Dollar
Conversion Rate: 1.00000000
Edits to Submitted Bids: Allowed
Multiple Bids: Not Allowed

Step 1: Enter Line Bid Responses

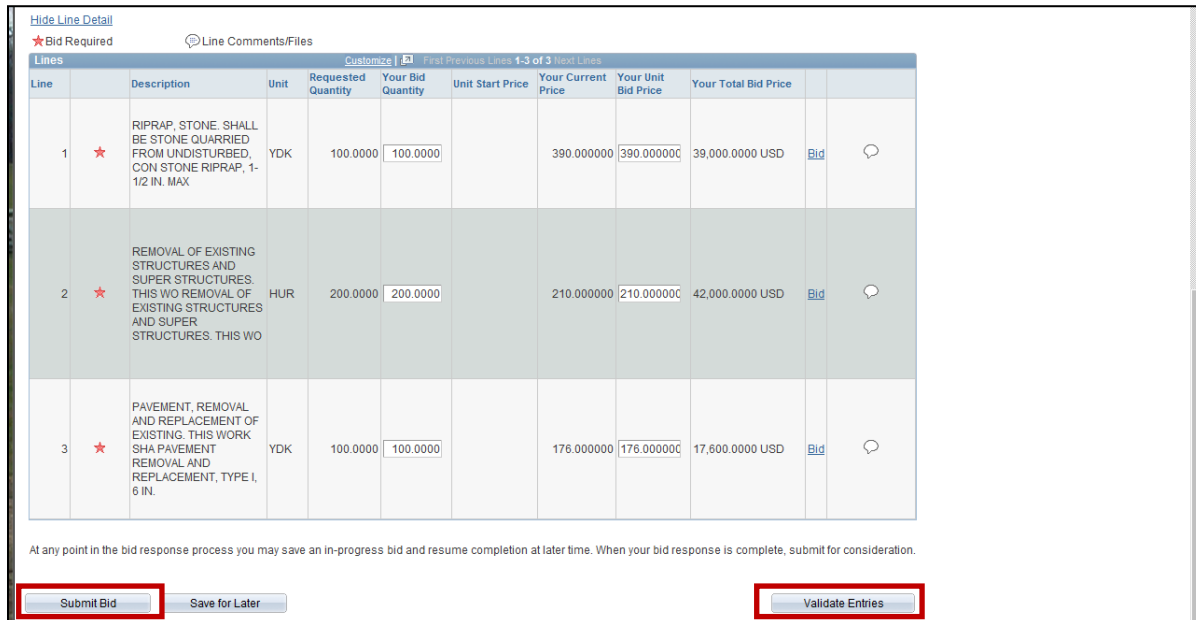
This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 3

Lines That Require a Response: 3

Lines Responded To: 0

- 18** The **Event Details** page identifies the required responses, to include bid factors and the amount of lines and groups, if applicable, for the Bid Processor to answer.



[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Customize | First Previous Lines 1-3 of 3 Next Lines

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Unit Start Price	Your Current Price	Your Unit Bid Price	Your Total Bid Price		
1	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	100.0000	<input type="text" value="100.0000"/>		390.000000	<input type="text" value="390.000000"/>	39,000.0000 USD	Bid	
2	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	200.0000	<input type="text" value="200.0000"/>		210.000000	<input type="text" value="210.000000"/>	42,000.0000 USD	Bid	
3	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	100.0000	<input type="text" value="100.0000"/>		176.000000	<input type="text" value="176.000000"/>	17,600.0000 USD	Bid	

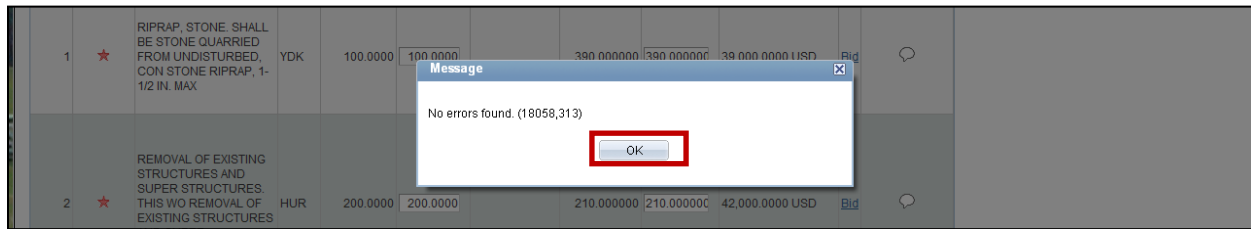
At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

- 19** Enter the bid responses.

- 20** Click on the **Validate Entries** button to check for errors. A confirmation message will display.

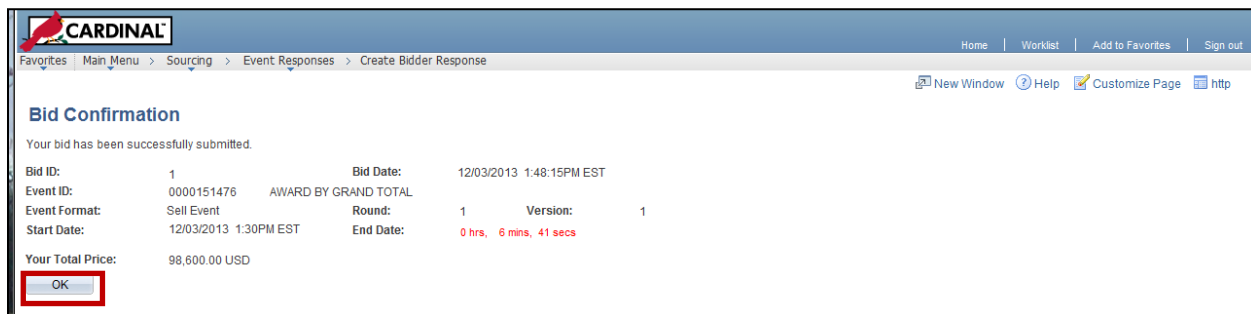
Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



A message box is displayed over the bid entry form. The message box contains the text: "No errors found. (18058,313)". Below the message is an "OK" button, which is highlighted with a red rectangle.

21 Click **OK**.

22 After all the bid information has been entered, click the **Submit Bid** button. The **Bid Confirmation** page is displayed.

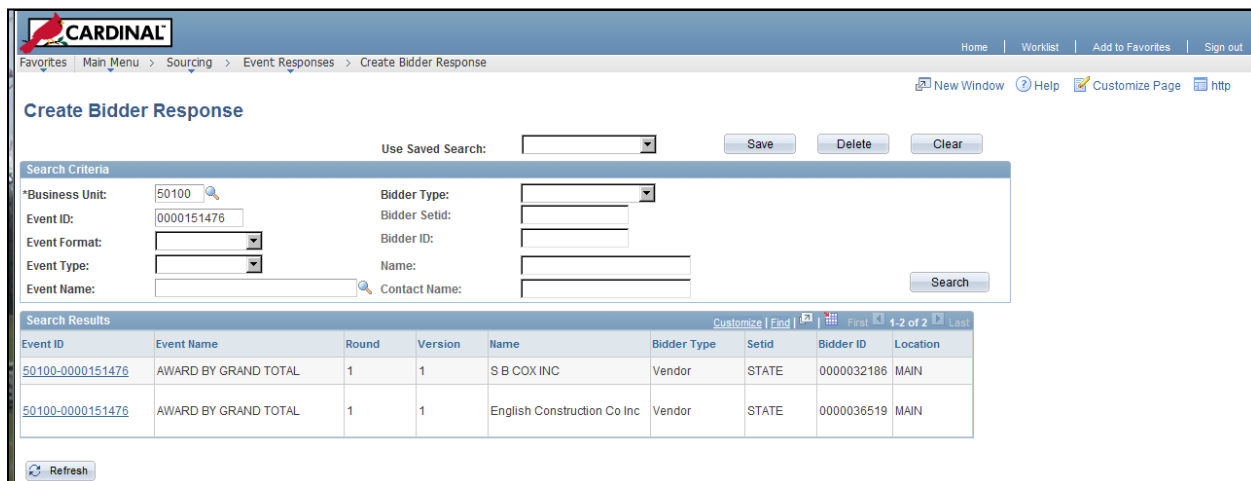


The **Bid Confirmation** page is displayed. It shows the following information:

- Your bid has been successfully submitted.
- Bid ID: 1
- Event ID: 0000151476
- Event Format: Sell Event
- Start Date: 12/03/2013 1:30PM EST
- Your Total Price: 98,600.00 USD
- Bid Date: 12/03/2013 1:48:15PM EST
- AWARD BY GRAND TOTAL
- Round: 1
- Version: 1
- End Date: 0 hrs, 6 mins, 41 secs

An "OK" button is highlighted with a red rectangle.

23 Click **OK**. The **Create Bidder Response** page is displayed.



The **Create Bidder Response** page is displayed. It shows the following information:

- Search Criteria:
 - *Business Unit: 50100
 - Event ID: 0000151476
 - Event Format: [Dropdown]
 - Event Type: [Dropdown]
 - Event Name: [Text Box]
 - Bidder Type: [Dropdown]
 - Bidder Setid: [Text Box]
 - Bidder ID: [Text Box]
 - Name: [Text Box]
 - Contact Name: [Text Box]
- Search Results:

Event ID	Event Name	Round	Version	Name	Bidder Type	Setid	Bidder ID	Location
50100-0000151476	AWARD BY GRAND TOTAL	1	1	S B COX INC	Vendor	STATE	0000032186	MAIN
50100-0000151476	AWARD BY GRAND TOTAL	1	1	English Construction Co Inc	Vendor	STATE	0000036519	MAIN

A "Refresh" button is located at the bottom left.

24 Repeat the bid entry process for all bidders.

25 Bid processing is complete.

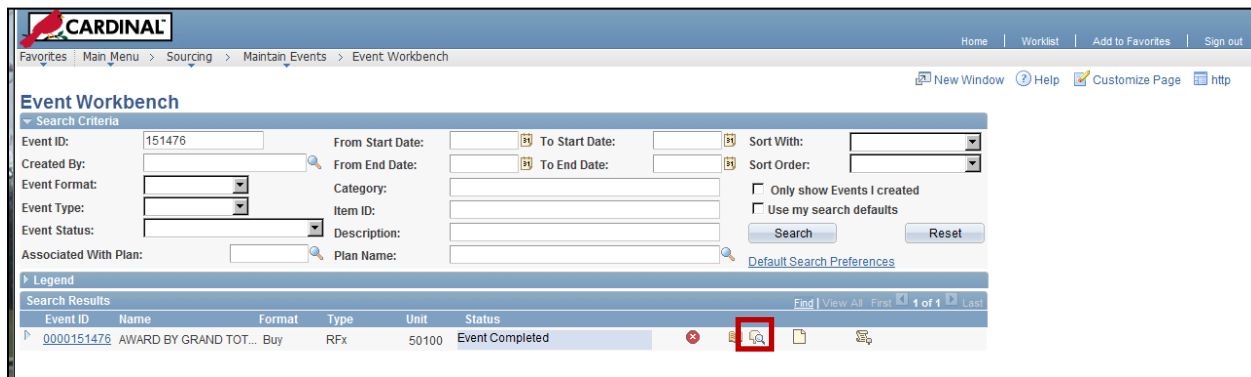
Analyze Bids & Award Event – By Total

Once an event's **End Date** has passed and all the bids have been entered, using the **Event Workbench** you can review the bids. Bids are considered and awarded based on the sum of all line items (by total).

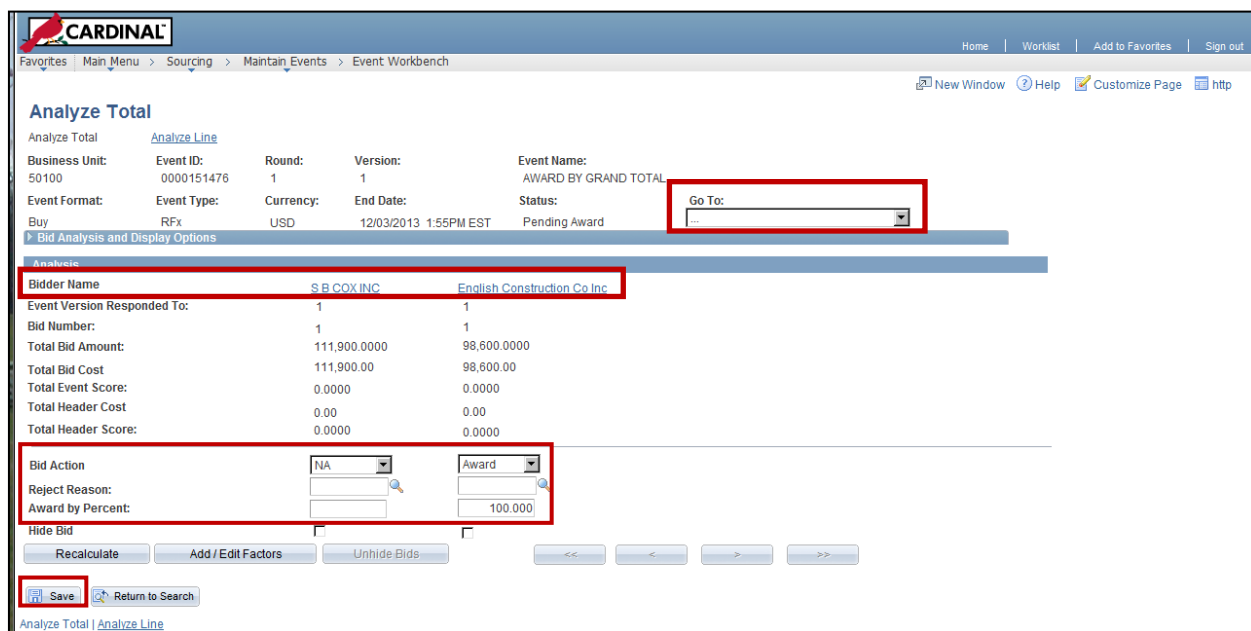
26 You can navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



27 Click on the **Analyze** icon next to the event with bids you wish to review. The **Analyze Total** page will display.



28 The **Total Bid Amount** by Bidder is displayed.

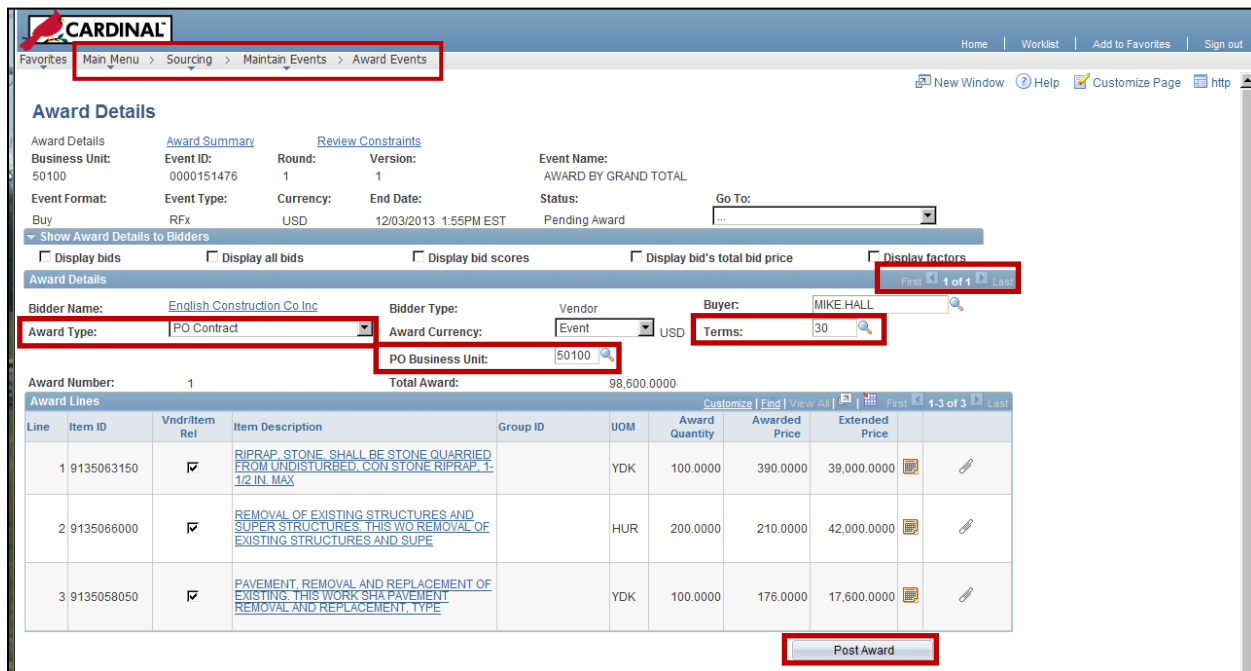
29 In the column related to each winning Bidder, select the **Bid Action** of **Award**.

30 In the column related to each winning Bidder, set the **Award by Percent**. You could choose to allocate a portion of the event award to multiple bidders using the **Award by Percent** field.

31 Click **Save**.

32 From the **Award Details** page you will make the award to the PO or contract. You can navigate to the **Award Details** page using the following path: **Main Menu > Sourcing > Maintain Events > Award Events**. You can also access this page from the **Analyze Total** page by clicking on the drop-down arrow in the **Go To** box, and selecting **Award Events**. The **Award Details** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Award Details

Award Summary | Review Constraints

Business Unit: 50100 | Event ID: 0000151476 | Round: 1 | Version: 1 | Event Name: AWARD BY GRAND TOTAL

Event Format: Buy | Event Type: RFX | Currency: USD | End Date: 12/03/2013 1:55PM EST | Status: Pending Award | Go To: [Dropdown]

▼ Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details

Bidder Name: English Construction Co Inc | Bidder Type: Vendor | Buyer: MIKE HALL

Award Type: PO Contract | Award Currency: Event | USD | Terms: 30

PO Business Unit: 50100

Award Number: 1 | Total Award: 98,600.0000

Line	Item ID	Vndr/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
1	9135063150	✓	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX		YDK	100.0000	390.0000	39,000.0000
2	9135066000	✓	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPE		HUR	200.0000	210.0000	42,000.0000
3	9135058050	✓	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE		YDK	100.0000	176.0000	17,600.0000

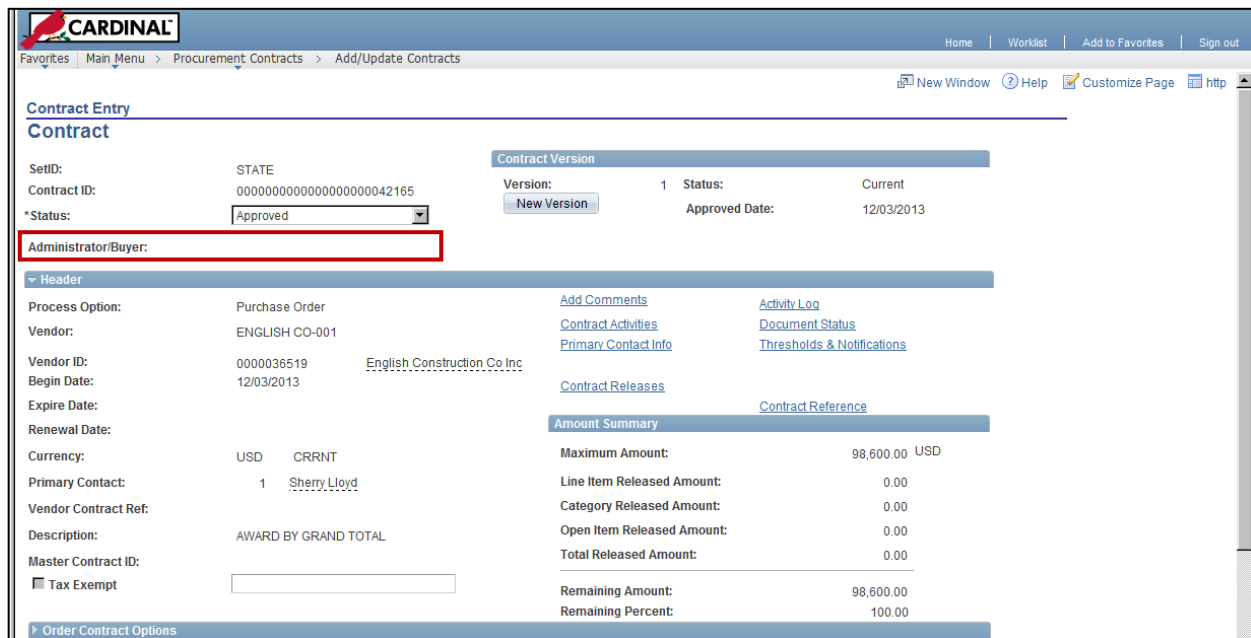
Post Award

33 In the top right of the **Award Details** section we see there is only one winning bidder, e.g., 1 of 1.

34 Enter the **Award Type** of either **PO** or **PO Contract**.

35 Confirm / update the **PO Business Unit**.

36 Confirm / update the payment **Terms**.



Contract Entry

Contract

SetID: STATE | Contract ID: 0000000000000000000042165 | Status: Approved | Administrator/Buyer: [Redacted]

Contract Version: Version: 1 | Status: Current | Approved Date: 12/03/2013

▼ Header

Process Option: Purchase Order | Vendor: ENGLISH CO-001 | Vendor ID: 0000036519 | English Construction Co Inc | Begin Date: 12/03/2013 | Expire Date: | Renewal Date: | Currency: USD | CRRNT | Primary Contact: 1 | Sherry Lloyd | Vendor Contract Ref: | Description: AWARD BY GRAND TOTAL | Master Contract ID: | Tax Exempt: [Redacted]

Amount Summary

Maximum Amount:	98,600.00 USD
Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	0.00
Remaining Amount:	98,600.00
Remaining Percent:	100.00

Order Contract Options

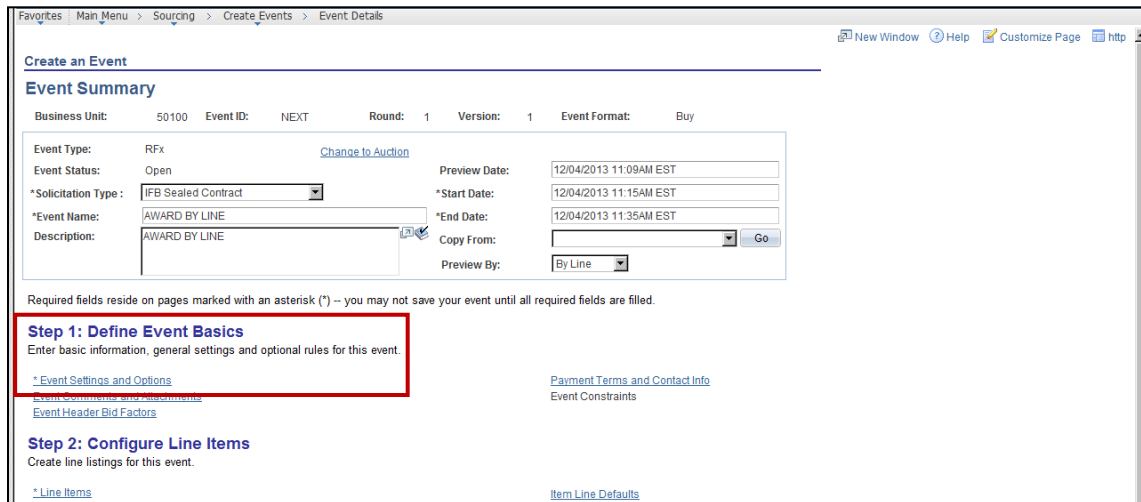
37 Click on the **Post Award** button. The **Contract Entry – Contract** page is displayed.

38 The contract award is displayed. A **Contract ID** is generated and displayed.

Award 'By Line'

Event Creation – By Line

- 1 To award an event by line(s) some unique set up must be done during the creation of the event. From Ex. 1 above follow steps 1-4 to access the **Create an Event – Event Summary** page.



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name: AWARD BY LINE

Description: AWARD BY LINE

Preview Date: 12/04/2013 11:09AM EST

*Start Date: 12/04/2013 11:15AM EST

*End Date: 12/04/2013 11:35AM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Constraints and Restrictions](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

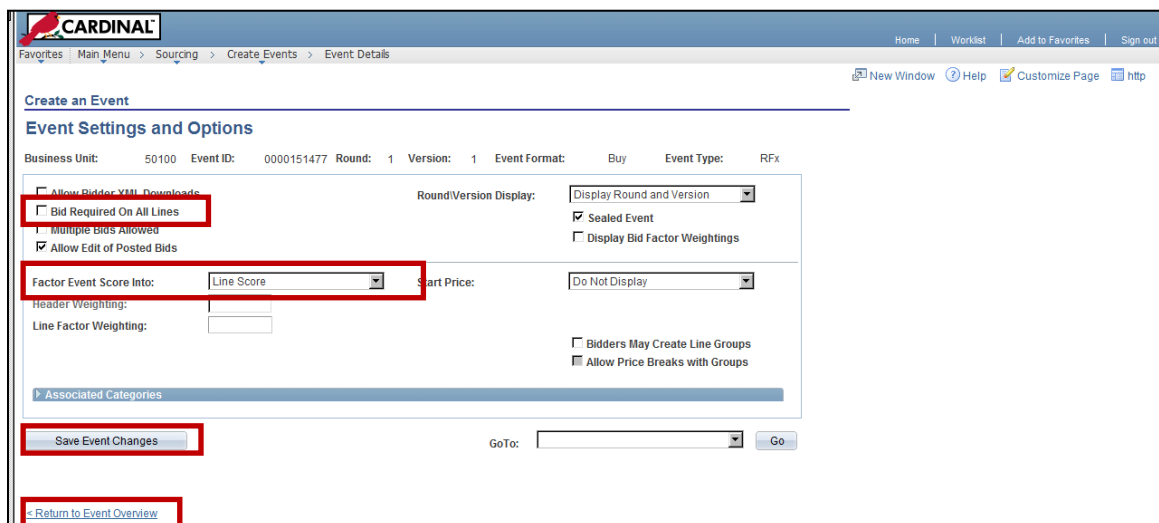
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

- 2 Set the **Preview By = By Line**.
- 3 Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink. The **Event Settings and Options** page is displayed.



Event Settings and Options

Business Unit: 50100 Event ID: 0000151477 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads

☐ Bid Required On All Lines

☐ Multiple Bids Allowed

☒ Allow Edit of Posted Bids

Factor Event Score Into: Line Score

Start Price: Do Not Display

Header Weighting:

Line Factor Weighting:

☐ Bidders May Create Line Groups

☒ Allow Price Breaks with Groups

Associated Categories

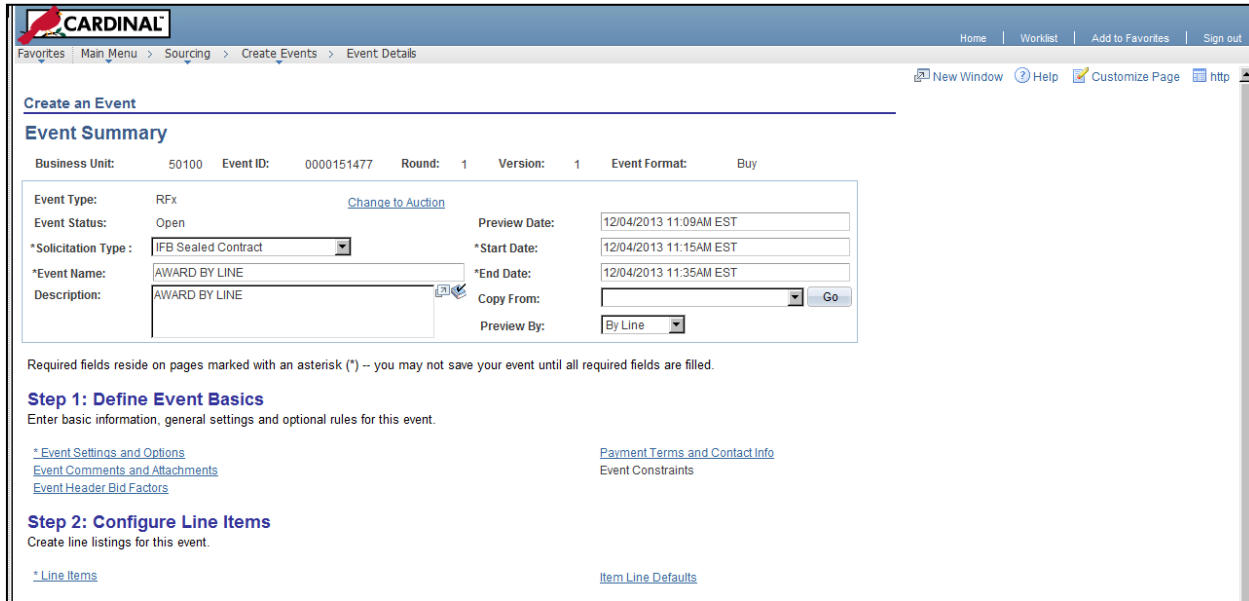
Save Event Changes

GoTo:

[Return to Event Overview](#)

- 4 Do NOT check the **Bid Required On All Lines** checkbox.
- 5 **Factor Event Score Into = Line Score**.
- 6 Click on the **Save Event Changes** button.
- 7 Click on the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



The screenshot shows the 'Create an Event' page in the CARDINAL system. The top navigation bar includes links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation bar, the breadcrumb trail reads: Favorites | Main Menu > Sourcing > Create Events > Event Details. The main content area is titled 'Create an Event' and 'Event Summary'. It displays the following information:

- Business Unit: 50100
- Event ID: 0000151477
- Round: 1
- Version: 1
- Event Format: Buy

The 'Event Type' is 'RFx' with a link to 'Change to Auction'. The 'Event Status' is 'Open'. The 'Solicitation Type' is 'IFB Sealed Contract'. The 'Event Name' is 'AWARD BY LINE' and the 'Description' is 'AWARD BY LINE'. The 'Preview Date' is '12/04/2013 11:09AM EST'. The '*Start Date' is '12/04/2013 11:15AM EST' and the '*End Date' is '12/04/2013 11:35AM EST'. The 'Copy From' field is empty, and the 'Preview By' is 'By Line'. A 'Go' button is next to the 'Copy From' field.

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

- * [Event Settings and Options](#)
- [Event Comments and Attachments](#)
- [Event Header Bid Factors](#)
- [Payment Terms and Contact Info](#)
- [Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

- * [Line Items](#)
- [Item Line Defaults](#)

- 8 Follow normal procedures to enter **Event Header Bid Factors** if necessary.
- 9 Under **Step 2: Configure Line Items**, click on the **Line Items** hyperlink. The **Create Event – Line Items** page displays.
- 10 Follow normal procedures to enter all the event lines, i.e., items. These will be totaled for the bid.
- 11 Click on the **Save Event Changes** button. The **Event ID #** is generated.
- 12 Click on the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page will display.
- 13 Once you have added bidders, e.g., **Public Event**, and followed normal event creation steps, as documented in the course titled **501 PR345 Strategic Sourcing**, you may **Save** and **Post** the event.

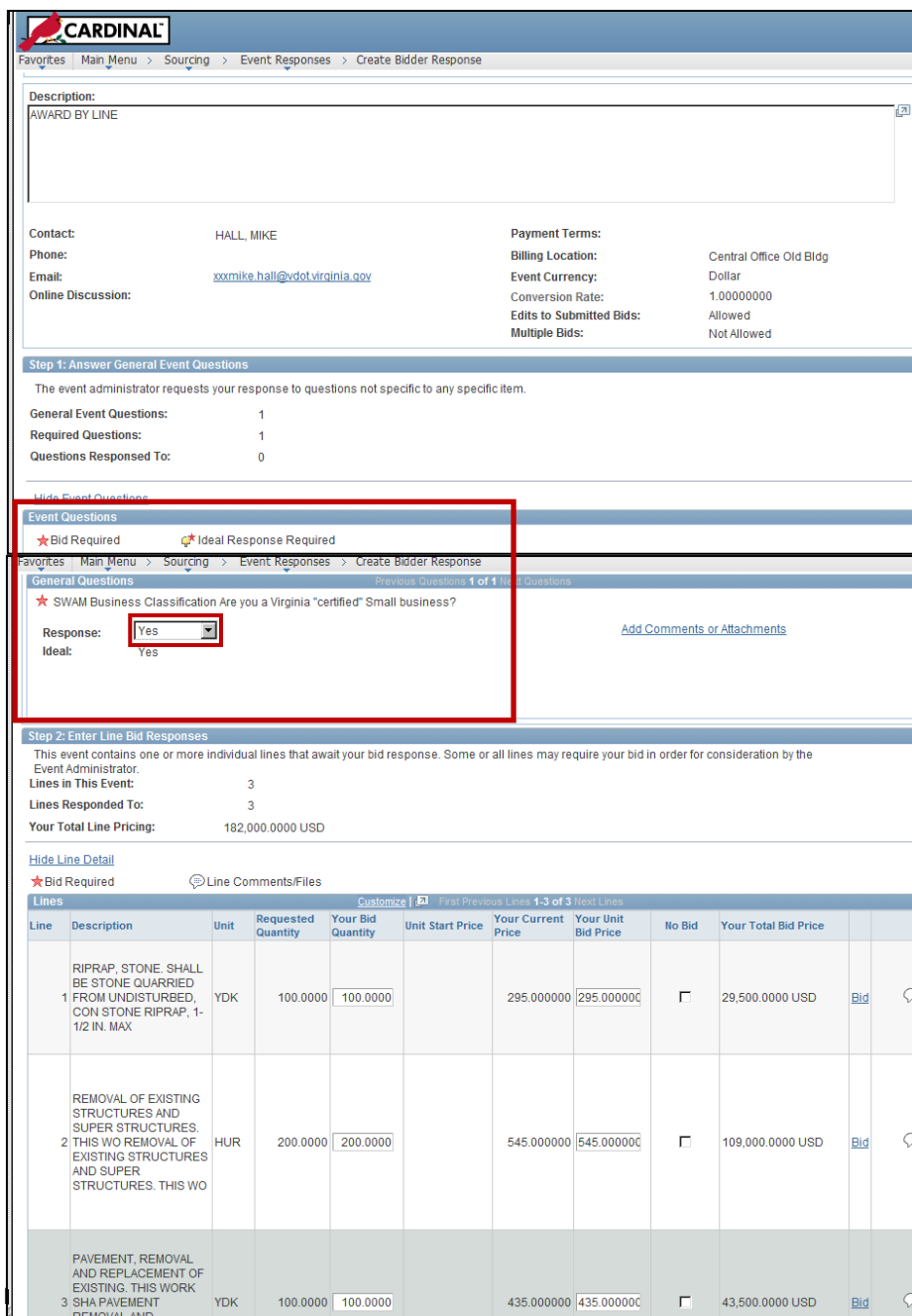
Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Enter Bids – By Line

The system allows for bid responses to be entered once the event's **Start Date** has passed and prior to its **End Date**. Generally, VDOT business processes require that bidders and bids be entered in the system after the event's **End Date**. Therefore, the Bid Processor must create a new version of the event with an extended **End Date** in order to open a window of time for bidder and bid response entry into Cardinal. Summary level instructions for entering bids are to follow. For additional instructions on entering bids refer to the course titled **501 PR345 Strategic Sourcing**.

- 14** To enter bids, navigate to the **Create Bidder Response** page using the following path and follow normal bid entry procedures as previously documented:

Main Menu > Sourcing > Event Responses > Create Bidder Response



DESCRIPTION:
AWARD BY LINE

Contact: HALL, MIKE
Phone:
Email: xxxmike.hall@vdot.virginia.gov
Online Discussion:

Payment Terms:
Billing Location: Central Office Old Bldg
Event Currency: Dollar
Conversion Rate: 1.00000000
Edits to Submitted Bids: Allowed
Multiple Bids: Not Allowed

Step 1: Answer General Event Questions
The event administrator requests your response to questions not specific to any specific item.
General Event Questions: 1
Required Questions: 1
Questions Responded To: 0

Event Questions
★ Bid Required ★ Ideal Response Required

General Questions
★ SWAM Business Classification Are you a Virginia "certified" Small business?
Response: Yes
Ideal: Yes

Step 2: Enter Line Bid Responses
This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.
Lines in This Event: 3
Lines Responded To: 3
Your Total Line Pricing: 182,000.0000 USD

Hide Line Detail
★ Bid Required Line Comments/Files

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Unit Start Price	Your Current Price	Your Unit Bid Price	No Bid	Your Total Bid Price	
1	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	100.0000	100.0000		295.000000	295.000000	<input type="checkbox"/>	29,500.0000 USD	Bid
2	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	200.0000	200.0000		545.000000	545.000000	<input type="checkbox"/>	109,000.0000 USD	Bid
3	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK 3 SHA PAVEMENT REMOVAL AND	YDK	100.0000	100.0000		435.000000	435.000000	<input type="checkbox"/>	43,500.0000 USD	Bid

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

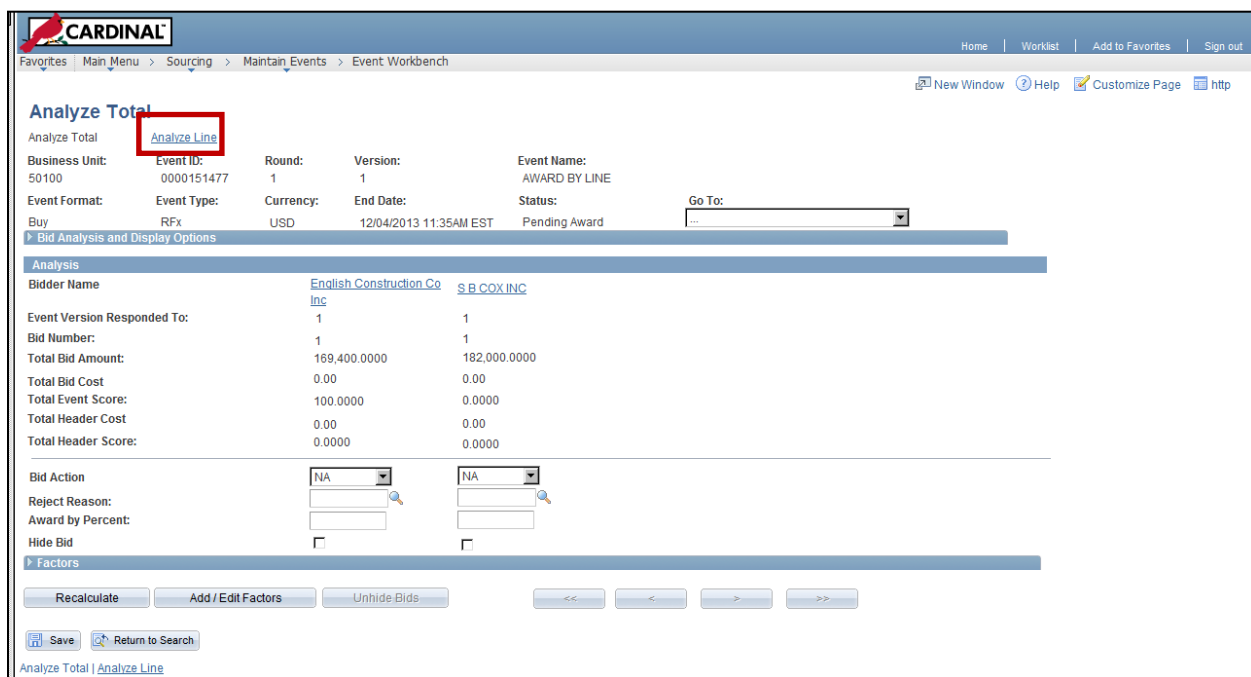
- 15 Items with a red star icon require a bid response to be entered.
- 16 Enter the bid response and bid amounts on the Bidder's behalf for each line.
- 17 Complete normal bid processing steps.
- 18 Repeat the bid entry process for all bidders.
- 19 Bid processing is complete.

Analyze Bids & Award Event – By Line

Once an event's **End Date** has passed and all the bids have been entered, using the **Event Workbench** you can review the bids. Bids are considered and awarded based on the line items (by line).

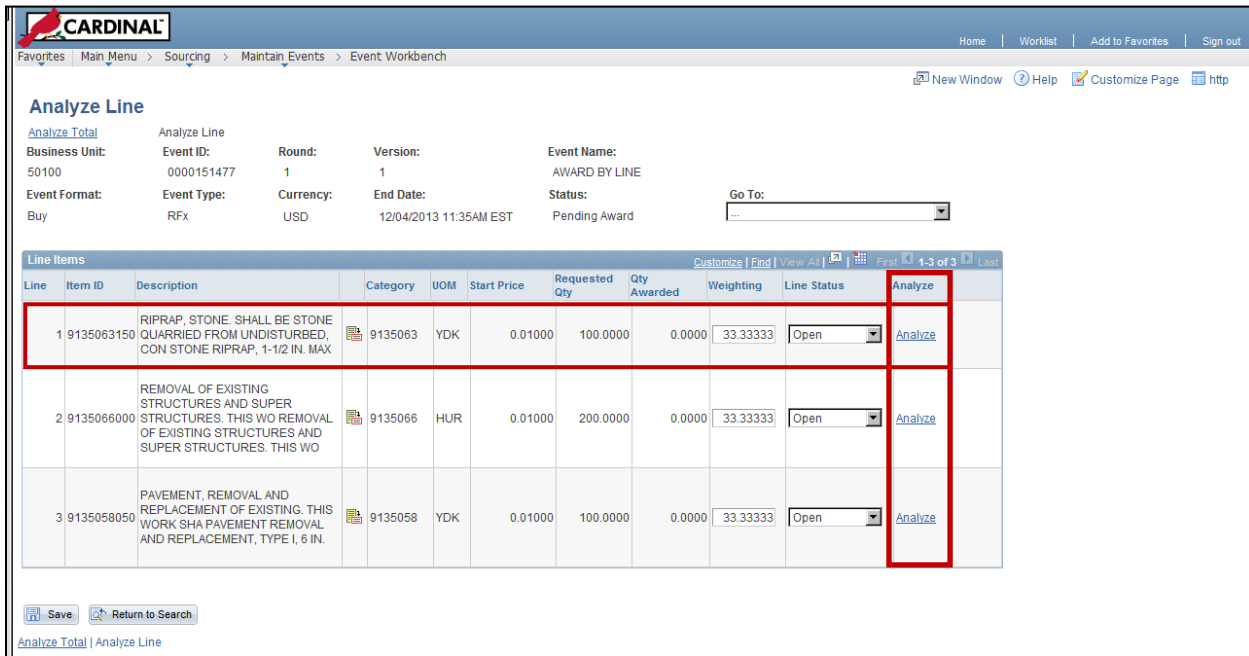
- 20 Navigate to the **Event Workbench** page using the following path, and follow normal procedures to analyze an event:

Main Menu > Sourcing > Maintain Events > Event Workbench



- 21 From the **Analyze Total** page, click on the **Analyze Line** hyperlink. The first **Analyze Line** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



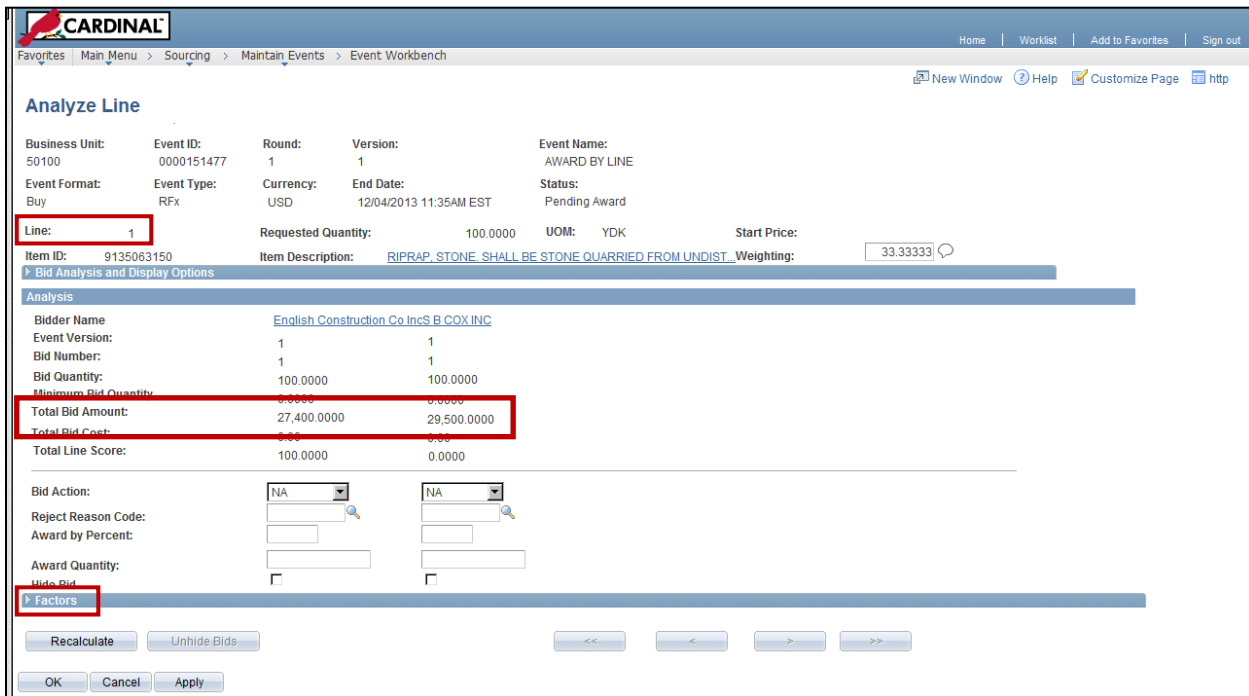
Analyze Line

Business Unit: 50100 Event ID: 0000151477 Round: 1 Version: 1 Event Name: AWARD BY LINE
 Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 11:35AM EST Status: Pending Award

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	9135063150	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	9135063	YDK	0.01000	100.0000	0.0000	33.33333	Open	Analyze
2	9135066000	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	9135066	HUR	0.01000	200.0000	0.0000	33.33333	Open	Analyze
3	9135058050	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	9135058	YDK	0.01000	100.0000	0.0000	33.33333	Open	Analyze

Save Return to Search

- 22** Click on the **Analyze** hyperlink next to the **Line** you wish to award. The second **Analyze Line** page will display and details the extended bid response.



Analyze Line

Business Unit: 50100 Event ID: 0000151477 Round: 1 Version: 1 Event Name: AWARD BY LINE
 Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 11:35AM EST Status: Pending Award

Line: 1 Requested Quantity: 100.0000 UOM: YDK Start Price: 33.33333

Item ID: 9135063150 Item Description: RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDIST. Weighting: 33.33333

Bid Analysis and Display Options

Analysis

Bidder Name	English Construction Co Inc S B COX INC	
Event Version:	1	1
Bid Number:	1	1
Bid Quantity:	100.0000	100.0000
Minimum Bid Quantity:	0.0000	0.0000
Total Bid Amount:	27,400.0000	29,500.0000
Total Bid Cost:	0.00	0.00
Total Line Score:	100.0000	0.0000

Bid Action: NA NA

Reject Reason Code: Award by Percent: Award Quantity: Hide Bid

Factors

Recalculate Unhide Bids

OK Cancel Apply

- 23** Click on the arrow next to the **Factors** section to expand the section.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Line: 1 Requested Quantity: 100.0000 UOM: YDK Start Price: 33.33333

Item ID: 9135063150 Item Description: RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDIST. Weighting: 33.33333

Bid Analysis and Display Options

Analysis

Bidder Name: English Construction Co Inc S B COX INC

Event Version: 1 1

Bid Number: 1 1

Bid Quantity: 100.0000 100.0000

Minimum Bid Quantity: 0.0000 0.0000

Total Bid Amount: 27,400.0000 29,500.0000

Total Bid Cost: 0.00 0.00

Total Line Score: 100.0000 0.0000

Bid Action: Award Award

Reject Reason Code: 50.000 50.000

Award by Percent: 50.000 50.000

Award Quantity: 50.000 50.000

Factors

Weighting UOM Ideal

What is your bid price?

100.00000 0 274.00 295.00

Recalculate Unhide Bids

OK Cancel Apply

- 24 The **Unit Price** bid response is displayed in the **Factors** section.
- 25 In the column related to each winning Bidder, select the **Bid Action** of **Award**.
- 26 In the column related to each winning Bidder, set the **Award by Percent**. You could choose to allocate a portion of the event award to multiple bidders using the **Award by Percent** field. In this example the award is split 50/50.
- 27 Click **OK**. The first **Analyze Line** page is displayed.

CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Sourcing | Maintain Events | Event Workbench

New Window | Help | Customize Page | http

Analyze Line

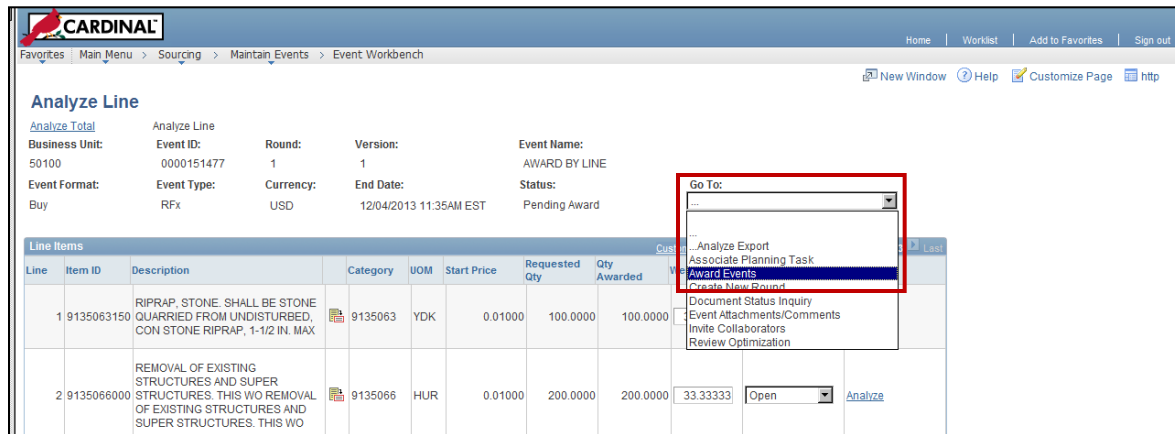
Business Unit: 50100 Event ID: 0000151477 Round: 1 Version: 1 Event Name: AWARD BY LINE

Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 11:35AM EST Status: Pending Award Go To: [Dropdown]

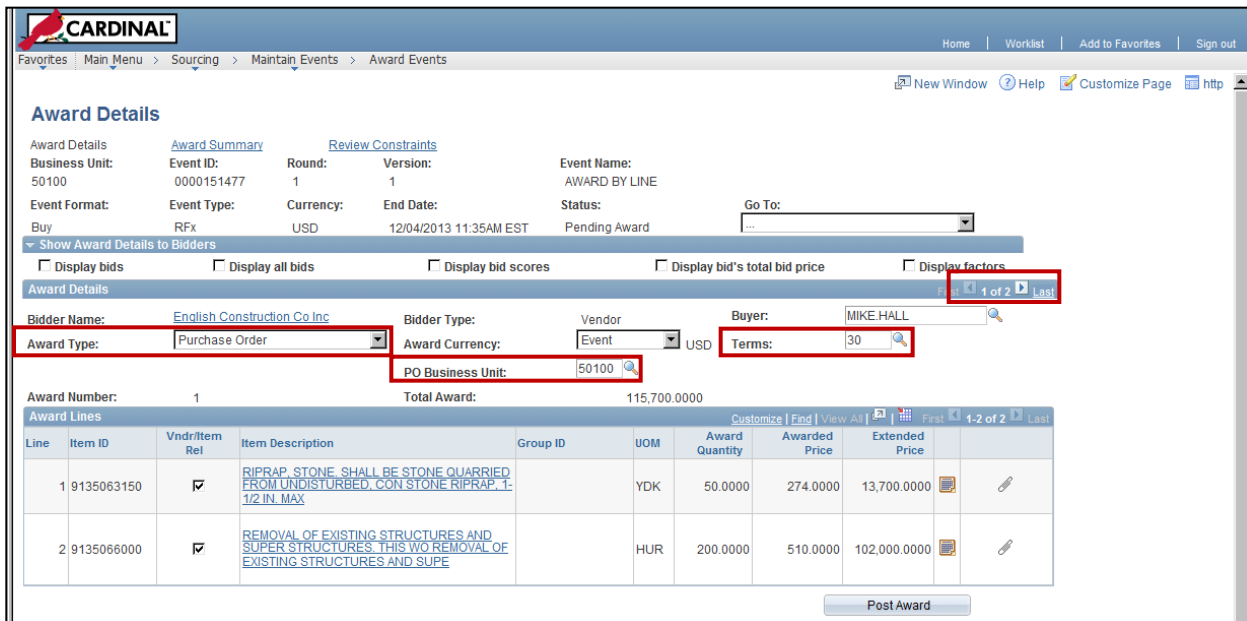
Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1	9135063150	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	9135063	YDK	0.01000	100.0000	100.0000	33.33333	Open	Analyze
2	9135066000	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	9135066	HUR	0.01000	200.0000	0.0000	33.33333	Open	Analyze
3	9135058050	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	9135058	YDK	0.01000	100.0000	0.0000	33.33333	Open	Analyze

- 28 **Line 1** now displays **Qty Awarded**.
- 29 Repeat the bid entry process for all lines.
- 30 When all lines have been awarded click on the **Save** button.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

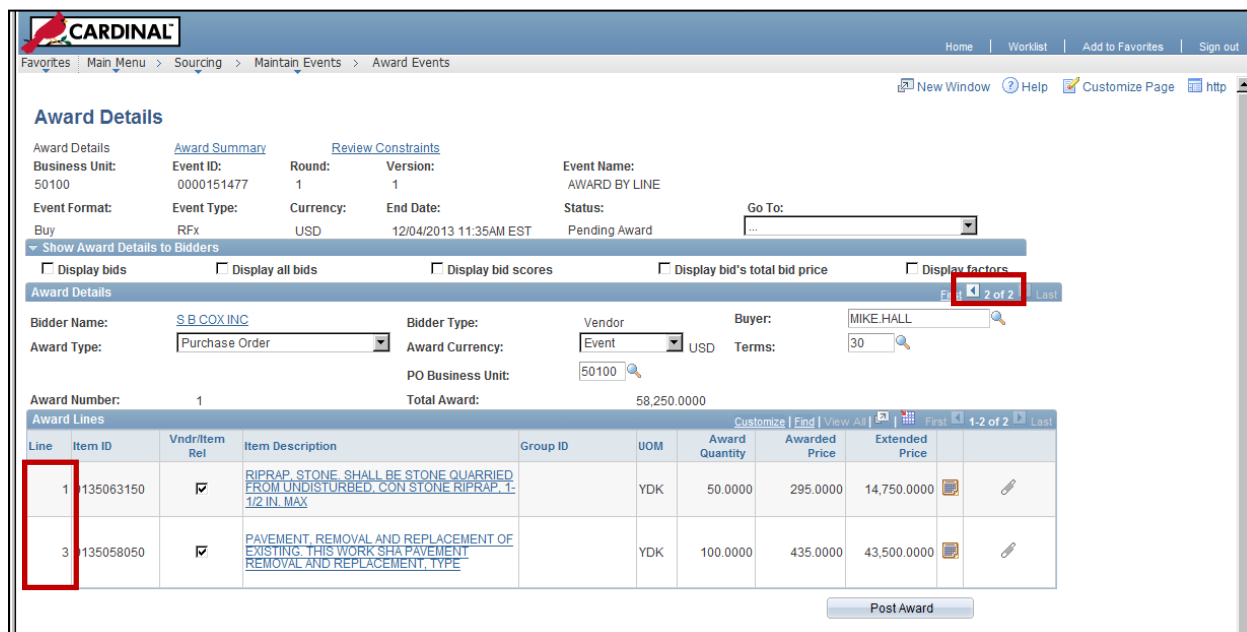


- 31 From the **Analyze Line** page you can navigate to the **Award Details** page where you will make the award to the PO or contract. Navigate to the **Award Details** page using the following path: **Main Menu > Sourcing > Maintain Events > Award Events**. You can also access this page from the **Analyze Line** page by clicking on the drop-down arrow in the **Go To** box, and selecting **Award Events**. The **Award Details** page displays.
- 32 In the example above you can see that 2 Bidders received an award. The first Bidder is displayed and has received an award for 2 lines, part of **Line 1**, and all of **Line 2**.



- 33 Enter the **Award Type** of either **PO** or **PO Contract**.
- 34 Confirm / update the **PO Business Unit**.
- 35 Confirm / update the payment **Terms**.
- 36 To enter their **Award Details** for the 2nd Bidder, from the **Award Lines** section blue header bar, click on the arrow icon.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Award Details

Award Summary [Review Constraints](#)

Business Unit: 50100 Event ID: 0000151477 Round: 1 Version: 1 Event Name: AWARD BY LINE

Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 11:35AM EST Status: Pending Award

Go To:

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details

Bidder Name: [S B COX INC](#) Bidder Type: Vendor Buyer: [MIKE HALL](#)

Award Type: Award Currency: USD Terms:

PO Business Unit: [50100](#)

Award Number: 1 Total Award: 58,250.0000

Line	Item ID	Vndr/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price		
1	135063150	<input checked="" type="checkbox"/>	RIPRAP STONE SHALL BE STONE QUARRIED FROM UNDISTURBED CON STONE RIPRAP 1-1/2 IN. MAX		YDK	50.0000	295.0000	14,750.0000		
3	135058050	<input checked="" type="checkbox"/>	PAVEMENT REMOVAL AND REPLACEMENT OF EXISTING THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE		YDK	100.0000	435.0000	43,500.0000		

[Post Award](#)

- 37 The 2nd awarded Bidder is displayed. In this example the 2nd Bidder has been awarded part of **Line 1** and all of **Line 3**.
- 38 Enter the **Award Type** of either **PO** or **PO Contract**.
- 39 Confirm / update the **PO Business Unit**.
- 40 Confirm / update the payment **Terms**.
- 41 Click on the **Post Award** button. Click on the **Post Award** button. The **Contract Entry – Contract** page is displayed.
- 42 The contract award is displayed. A **Contract ID** is generated and displayed.

Award 'By Group' (Lot)

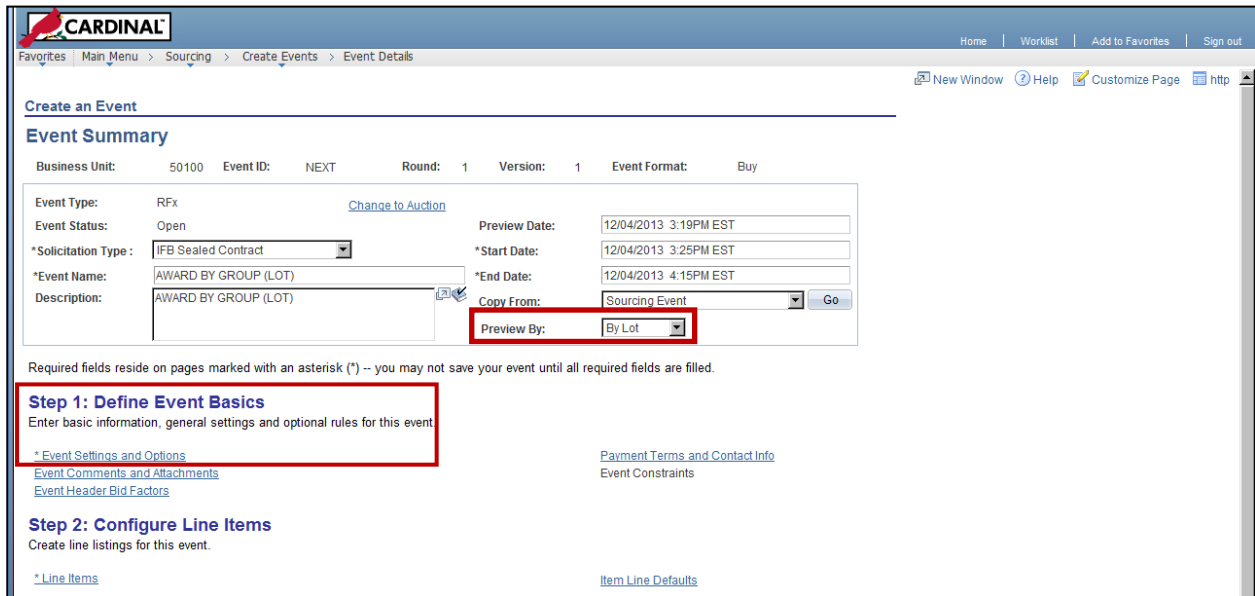
During event creation, the SS Buyer can select lines that they want to group to attempt to get better pricing through a bundled price quote. They use the **Line Details** page to add line items to a group. When a line is added to a group, the line's bid factors are copied into the group bid factors but remain associated with their respective items. The line weightings and bid factor weightings will be pro-rated within the group. Users can modify the bid factor questions and the best, worst, or ideal values for the bid factors within the group.

When you create the group, you define the group details, including group bid parameters, on the **Line Details** page. You can also indicate that a line can be bid on only as part of the group. If selected, the line is not available for bidding outside of a group.

Event Creation – By Group (Lot)

- 1 To award an event By **Group** / Lot some unique set up must be done during the creation of the event. From Ex. 1 above follow steps 1-4 to access the **Create an Event – Event Summary** page.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

* Solicitation Type: IFB Sealed Contract

* Event Name: AWARD BY GROUP (LOT)

Description: AWARD BY GROUP (LOT)

Preview Date: 12/04/2013 3:19PM EST

* Start Date: 12/04/2013 3:25PM EST

* End Date: 12/04/2013 4:15PM EST

Copy From: Sourcing Event

Preview By: By Lot

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

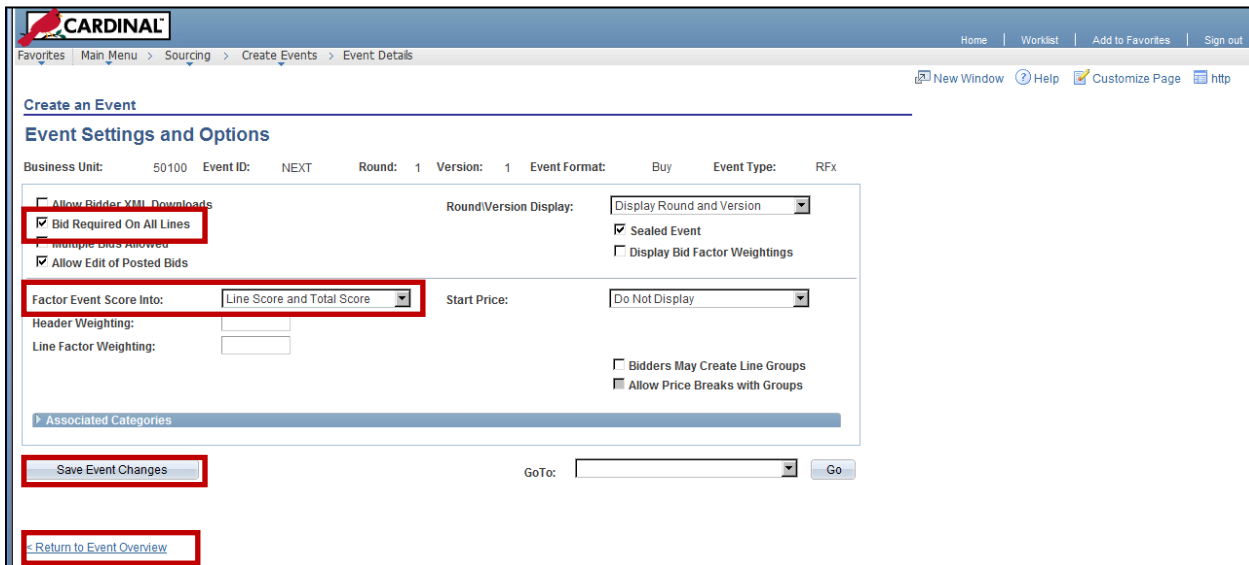
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

- 2 Set the **Preview By = By Lot**.
- 3 Under **Step 1: Define Event Basics**, click on the **Event Settings and Options** hyperlink. The **Event Settings and Options** page is displayed.



Create an Event

Event Settings and Options

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads

☒ Bid Required On All Lines

☐ Multiple Cuts Allowed

☒ Allow Edit of Posted Bids

Factor Event Score Into: Line Score and Total Score

Header Weighting:

Line Factor Weighting:

Round/Version Display: Display Round and Version

☒ Sealed Event

☐ Display Bid Factor Weightings

Start Price: Do Not Display

☐ Bidders May Create Line Groups

☒ Allow Price Breaks with Groups

[Associated Categories](#)

[Save Event Changes](#)

GoTo:

[Return to Event Overview](#)

- 4 Select the **Bid Required On All Lines** checkbox.
- 5 **Factor Event Score Into = Line Score and Total Score**
- 6 Click the **Save Event Changes** button.
- 7 Click the **Return to Event Overview** hyperlink. The **Create an Event – Event Summary** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

* Solicitation Type: IFB Sealed Contract

* Event Name: AWARD BY GROUP (LOT)

Description: AWARD BY GROUP (LOT)

Preview Date: 12/04/2013 3:19PM EST

* Start Date: 12/04/2013 3:25PM EST

* End Date: 12/04/2013 4:15PM EST

Copy From: Sourcing Event [Go](#)

Preview By: By Lot

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)

[Event Comments and Attachments](#) [Event Constraints](#)

[Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#) [Item Line Defaults](#)

- 8 Follow normal procedures to enter **Event Header Bid Factors** if necessary.
- 9 Under **Step 2: Configure Line Items**, click on the **Line Items** hyperlink. The **Create an Event - Line Items** page is displayed. Follow normal procedures to enter all the event lines, i.e., items. These will be included in the **Group** / Lot.

Line Items

Basic Definition Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting	
<input checked="" type="checkbox"/>	9135063150	RIPRAP, STONE. SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	9135063	YDK	100.0000	0.0100	\$1.00	0.00000	
<input checked="" type="checkbox"/>	9135066000	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	9135066	HUF	200.0000	0.0100	\$2.00	0.00000	
<input checked="" type="checkbox"/>	9135058050	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	9135058	YDK	100.0000	0.0100	\$1.00	0.00000	

Event Total: 4.0000 USD

Line Weighting Total: 0 % Remaining Weight: 100 %

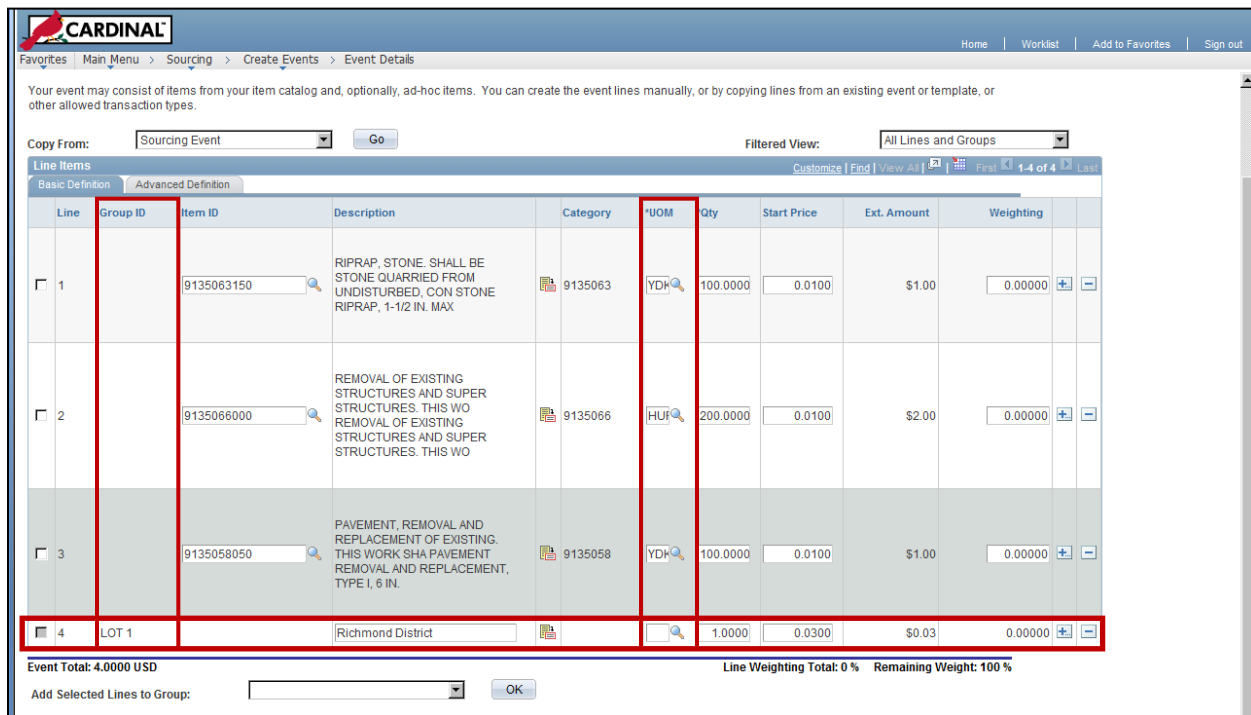
Add Selected Lines to Group: [\[Add to New Group\]](#) [OK](#)

Group ID: LOT 1

Description: Richmond District

- 10 From the **Create an Event – Line Items** page, select the checkbox next to the lines which will be in the group.
- 11 Click the drop-down arrow next to the field **Add Selected Lines to Group** and select **Add to New Group**. Two new fields will become available, **Group ID** and **Description**.
 - a. Enter a **Group ID**.
 - b. Enter a **Description**.
- 12 Click **OK**.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Copy From: Go

Filtered View:

Line Items: Basic Definition | Advanced Definition

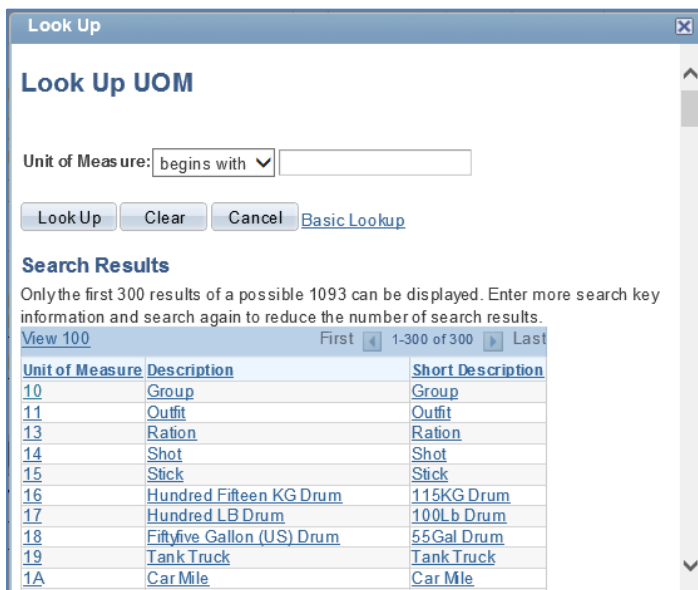
Line	Group ID	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
1		9135063150	RIPRAP, STONE SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	9135063	YDH	100.0000	0.0100	\$1.00	0.00000
2		9135066000	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	9135066	HUF	200.0000	0.0100	\$2.00	0.00000
3		9135058050	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	9135058	YDH	100.0000	0.0100	\$1.00	0.00000
4	LOT 1		Richmond District			1.0000	0.0300	\$0.03	0.00000

Event Total: 4.0000 USD

Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group: OK

13 A new line is added, e.g., **Line 4**. It represents the group and the **Group ID**, e.g., **Lot 1**, you entered is displayed.



Look Up

Look Up UOM

Unit of Measure:

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results of a possible 1093 can be displayed. Enter more search key information and search again to reduce the number of search results.

View 100 First 1-300 of 300 Last

Unit of Measure	Description	Short Description
10	Group	Group
11	Outfit	Outfit
13	Ration	Ration
14	Shot	Shot
15	Stick	Stick
16	Hundred Fifteen KG Drum	115KG Drum
17	Hundred LB Drum	100Lb Drum
18	Fiftyfive Gallon (US) Drum	55Gal Drum
19	Tank Truck	Tank Truck
1A	Car Mile	Car Mile

14 Click on the **Look Up UOM** icon.

15 Select a **Unit of Measure** for the group. For this example use **10 (Group)**.

16 Repeat the process for any additional groups you wish to create.

17 Click the **Save Event Changes** button.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Line Items

Business Unit: 50100 Event ID: 0000151482 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Filtered View:

Line Items Customize | Find | View All | First | 1-8 of 8 | Last

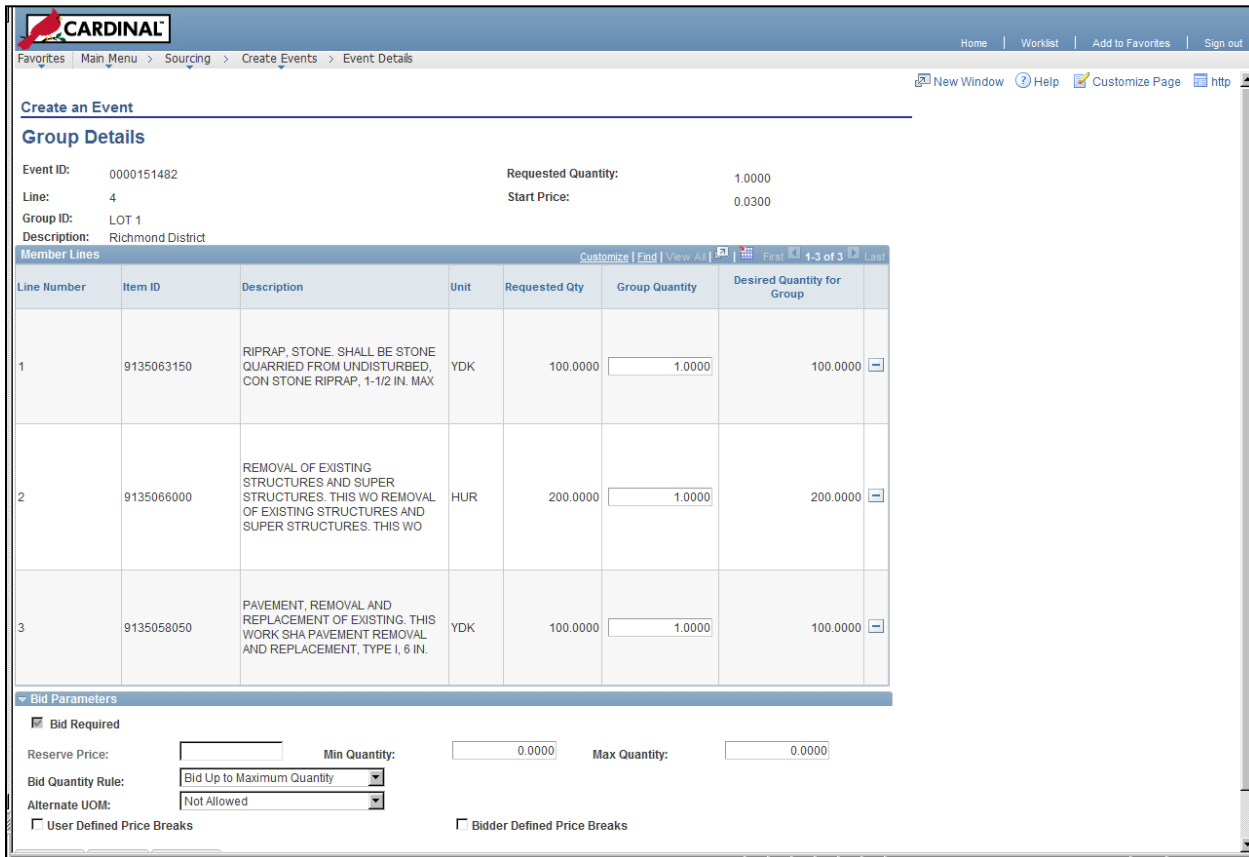
Basic Definition **Advanced Definition**

Line	Group ID	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints			
<input type="checkbox"/> 1		<input type="text" value="9135063150"/>	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	STATE	1 Group(s)	Details	Bid Factors	No			
<input type="checkbox"/> 2		<input type="text" value="9135066000"/>	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	STATE	1 Group(s)	Details	Bid Factors	No			
<input type="checkbox"/> 3		<input type="text" value="9135058050"/>	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	STATE	1 Group(s)	Details	Bid Factors	No			
<input checked="" type="checkbox"/> 4	LOT 1		<input type="text" value="Richmond District"/>	STATE	3 Line(s)	Details	Bid Factors	No			
<input type="checkbox"/> 5		<input type="text" value="9135063150"/>	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	STATE	1 Group(s)	Details	Bid Factors	No			

18 Click on the **Advanced Definition** tab.

19 Click on the **Details** hyperlink to confirm the lines and details related to the **Group** you just created. The **Create an Event – Group Details** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create an Event

Group Details

Event ID: 0000151482 Requested Quantity: 1.0000
 Line: 4 Start Price: 0.0300
 Group ID: LOT 1
 Description: Richmond District

Member Lines

Line Number	Item ID	Description	Unit	Requested Qty	Group Quantity	Desired Quantity for Group
1	9135063150	RIPRAP, STONE. SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	100.0000	1.0000	100.0000
2	9135066000	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	200.0000	1.0000	200.0000
3	9135058050	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	100.0000	1.0000	100.0000

Bid Parameters

☒ Bid Required

Reserve Price: Min Quantity: 0.0000 Max Quantity: 0.0000

Bid Quantity Rule: Bid Up to Maximum Quantity

Alternate UOM: Not Allowed

☐ User Defined Price Breaks ☐ Bidder Defined Price Breaks

20 Click **OK**.

21 Click the **Save Event Changes** button.

22 Click on the **Return to Event Overview** hyperlink.

23 Once you have added bidders, e.g., **Public Event**, and followed normal event creation steps, as documented in the course titled **501 PR345 Strategic Sourcing**, you may **Save** and **Post** the event.

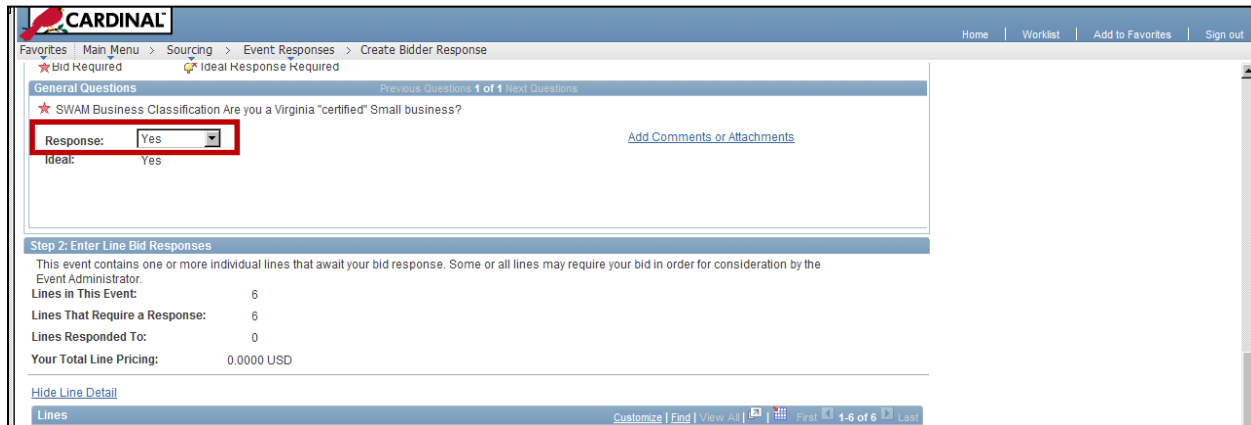
Enter Bids – By Group (Lot)

The system allows for bid responses to be entered once the event's **Start Date** has passed and prior to its **End Date**. Generally, VDOT business processes require that bidders and bids be entered in the system after the event's **End Date**. Therefore, the Bid Processor must create a new version of the event with an extended **End Date** in order to open a window of time for bidder and bid response entry into Cardinal. Summary level instructions for entering bids are to follow. For additional instructions on entering bids and creating new versions refer to the course titled **501 PR345 Strategic Sourcing**.

24 To enter bids, navigate to the **Create Bidder Response** page using the following path and follow normal bid entry procedures as previously documented:

Main Menu > Sourcing > Event Responses > Create Bidder Response

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Sourcing | Event Responses | Create Bidder Response

★ Bid Required | Ideal Response Required

General Questions Previous Questions 1 of 1 Next Questions

★ SWAM Business Classification Are you a Virginia "certified" Small business?

Response: Yes [Add Comments or Attachments](#)

Ideal: Yes

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 6

Lines That Require a Response: 6

Lines Responded To: 0

Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

Lines Customize | Find | View All | First 1-6 of 6 Last

25 Items with red star icon require a bid response to be entered.

26 Enter the **General Questions (Bid Factor)** response.

27 Scroll down the page to the **Enter Line Group Bid Response** section.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Sourcing | Event Responses | Create Bidder Response

3	★	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	100.0000	100.0000	123.000000	123.000000	12,300.0000 USD	Bid
5	★	RIPRAP, STONE. SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	100.0000	100.0000	123.000000	123.000000	12,300.0000 USD	Bid
6	★	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	200.0000	200.0000	123.000000	123.000000	24,600.0000 USD	Bid
7	★	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	100.0000	100.0000	123.000000	123.000000	12,300.0000 USD	Bid

Step 3: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more

Line Groups in This Event: 2 Groups Responded To: 0 [Display Group Detail](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

28 Complete the entry of all bid line responses. All Lines (in a **Group / Lot**) must be entered.

29 To view the groups and enter responses, click on the **Display Group Detail** hyperlink.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

5	★	STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	100.0000	100.0000		123.000000	123.000000	12,300.0000 USD	Bid
6	★	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	200.0000	200.0000		123.000000	123.000000	24,600.0000 USD	Bid
7	★	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	100.0000	100.0000		123.000000	123.000000	12,300.0000 USD	Bid

Step 3: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

Line Groups in This Event: 2 Groups Responded To: 0 [Hide Group Detail](#)

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Unit Start Price	Your Current Price	Your Unit Bid Price	Your Total Bid Price	
4	★ Richmond District	EA	1.0000	1.0000				0.0000 USD	Bid
8	★ Culpeper District	EA	1.0000	1.0000				0.0000 USD	Bid

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

30 Enter a **Bid Quantity** of 1 for each Group.

31 Do not enter a **Unit Bid Price**.

32 Click on the **Bid** hyperlink for the first Group, e.g. **Line 4**. The **Group Details** page displays.

Unit of Measure:	Each	Your Unit Bid Price:	369.000000
Qty Requested:	1.0000	Your Current Price:	369.000000
Your Max Bid Quantity:	1.0000	Bid Increment:	
		Total Bid Price:	369.0000 USD
		Reserve Price:	No

Line Number	Description	UOM	Group Quantity	Start Price	Your Unit Bid Price	Bid Quantity for Group
1	RIPRAP, STONE SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	1.0000	0.010000	123.000000	1.0000
2	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	1.0000	0.010000	123.000000	1.0000
3	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	1.0000	0.010000	123.000000	1.0000

Total Detail Price: 369.0000 USD

[Save for Later](#) [Start Page](#) [Validate Entries](#)

Group: 1 of 2 Go To Group: [Previous Group](#) [Next Group](#)

33 On the **Group Details** page, the values automatically populate and total. The **Total Detail Price** equals the sum of the lines unit pricing, not the sum of the lines extended pricing. Extended pricing will display on the **Bid Tabulation** report. **Do not make any changes.**

34 Click on the **Validate Entries** button. A pop-up message will appear.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards

Unit of Measure: Each
Qty Requested: 1.0000
Your Max Bid Quantity: 1.0000

Message
No errors found. (18058,313)
OK

Line Number	Description	UOM	Group Quantity	Start Price	Your Unit Bid Price	Bid Quantity for Group
5	RIPRAP, STONE, SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX	YDK	1.0000	0.010000	123.000000	1.0000
6	REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	1.0000	0.010000	123.000000	1.0000
7	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	1.0000	0.010000	123.000000	1.0000

Total Detail Price: 369.0000 USD

Save for Later Start Page Validate Entries

Group: 2 of 2 Go To Group: Previous Group Next Group

35 Click **OK**.

36 Click on the **Start Page** button. The **Event Details** page displays.

6	★	STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO	HUR	200.0000	200.0000	123.000000	123.000000	24,600.0000 USD	Bid
7	★	PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.	YDK	100.0000	100.0000	123.000000	123.000000	12,300.0000 USD	Bid

Step 3: Enter Line Group Bid Response
Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.
Line Groups in This Event: 2 Groups Responded To: 2 [Hide Group Detail](#)

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Unit Start Price	Your Current Price	Your Unit Bid Price	Your Total Bid Price	
4	★ Richmond District	EA	1.0000	1.0000		369.000000	369.000000	369.0000 USD	Bid
8	★ Culpeper District	EA	1.0000	1.0000				0.0000 USD	Bid

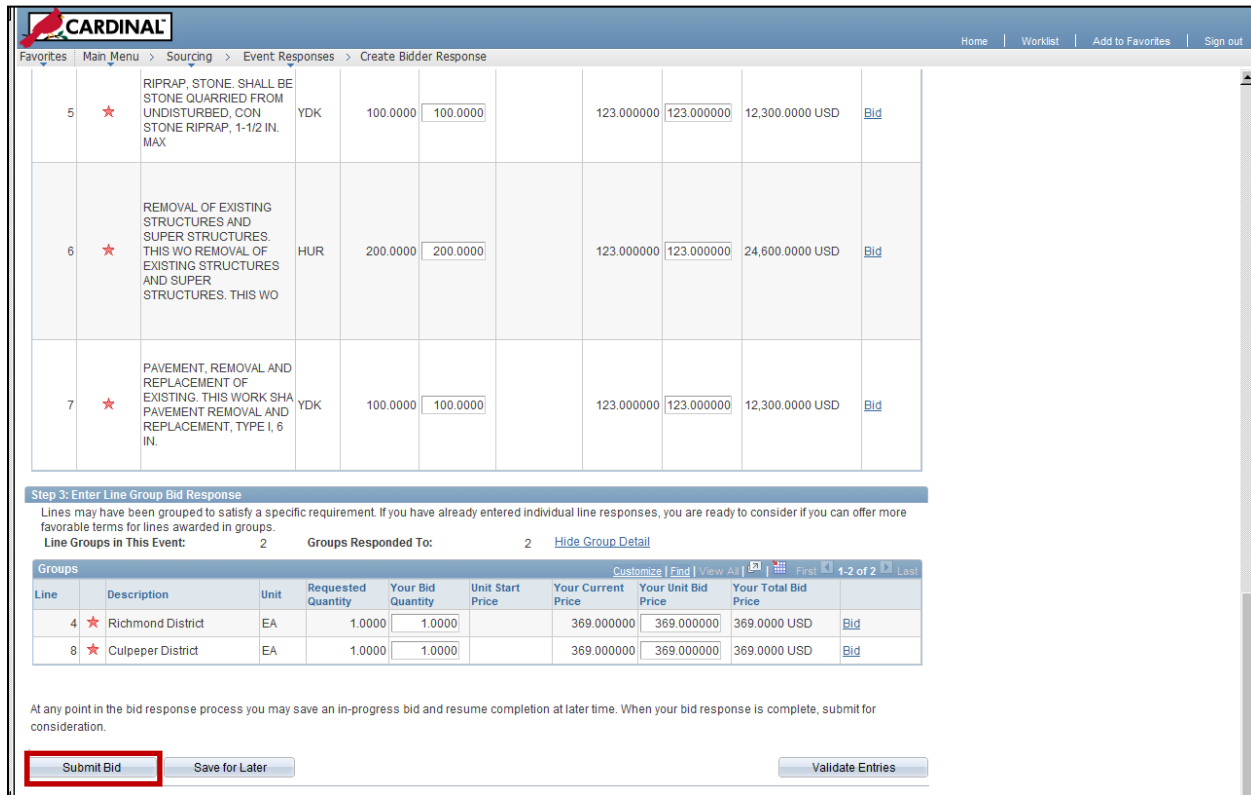
At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

37 The **Unit Bid Price** is automatically populated.

38 Click on the **Bid** hyperlink for 2nd Group / Lot and repeat the process until all groups are complete.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Step 3: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

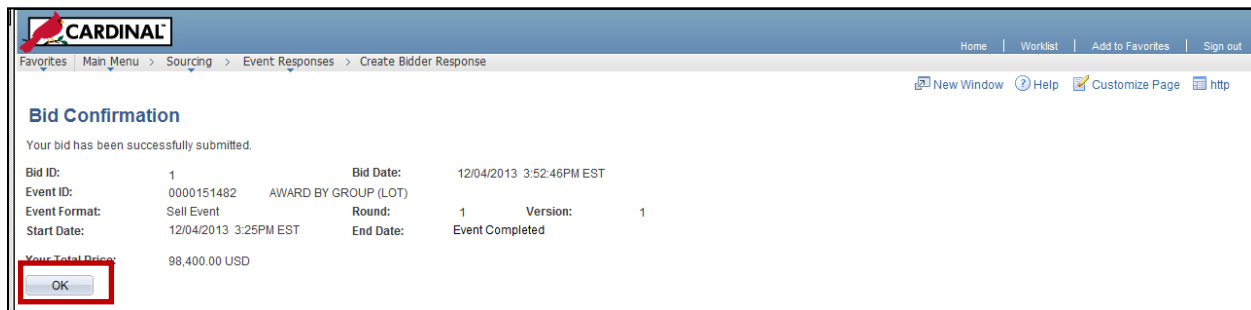
Line Groups in This Event: 2 Groups Responded To: 2 [Hide Group Detail](#)

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Unit Start Price	Your Current Price	Your Unit Bid Price	Your Total Bid Price	
4	Richmond District	EA	1.0000	1.0000		369.000000	369.000000	369.0000 USD	Bid
8	Culpeper District	EA	1.0000	1.0000		369.000000	369.000000	369.0000 USD	Bid

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

39 Once all Groups / Lots have been reviewed, entries validated, and the **Unit Bid Price** has been populated, click on **Submit Bid** button. The **Bid Confirmation** page displays.



Bid Confirmation

Your bid has been successfully submitted.

Bid ID: 1 Bid Date: 12/04/2013 3:52:46PM EST

Event ID: 0000151482 AWARD BY GROUP (LOT)

Event Format: Sell Event Round: 1 Version: 1

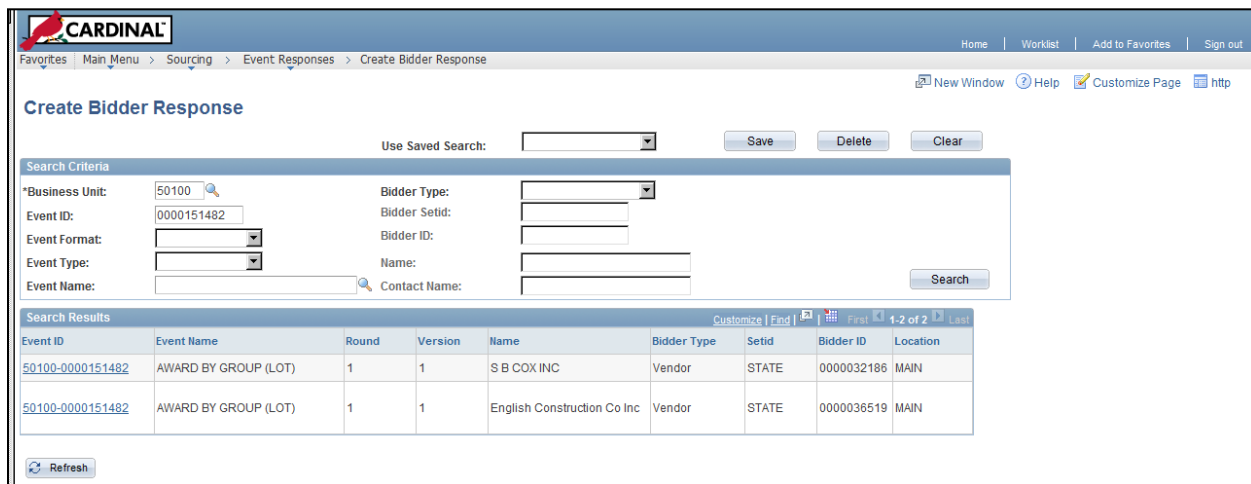
Start Date: 12/04/2013 3:25PM EST End Date: Event Completed

Your Total Price: 98,400.00 USD

[OK](#)

40 Click **OK**.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Create Bidder Response

Use Saved Search: Save Delete Clear

Search Criteria

*Business Unit: 50100 Bidder Type:
 Event ID: 0000151482 Bidder Setid:
 Event Format: Bidder ID:
 Event Type: Name:
 Event Name: Contact Name: Search

Search Results

Event ID	Event Name	Round	Version	Name	Bidder Type	Setid	Bidder ID	Location
50100-0000151482	AWARD BY GROUP (LOT)	1	1	S B COX INC	Vendor	STATE	0000032186	MAIN
50100-0000151482	AWARD BY GROUP (LOT)	1	1	English Construction Co Inc	Vendor	STATE	0000036519	MAIN

Refresh

41 Repeat the process for all remaining Bidders.

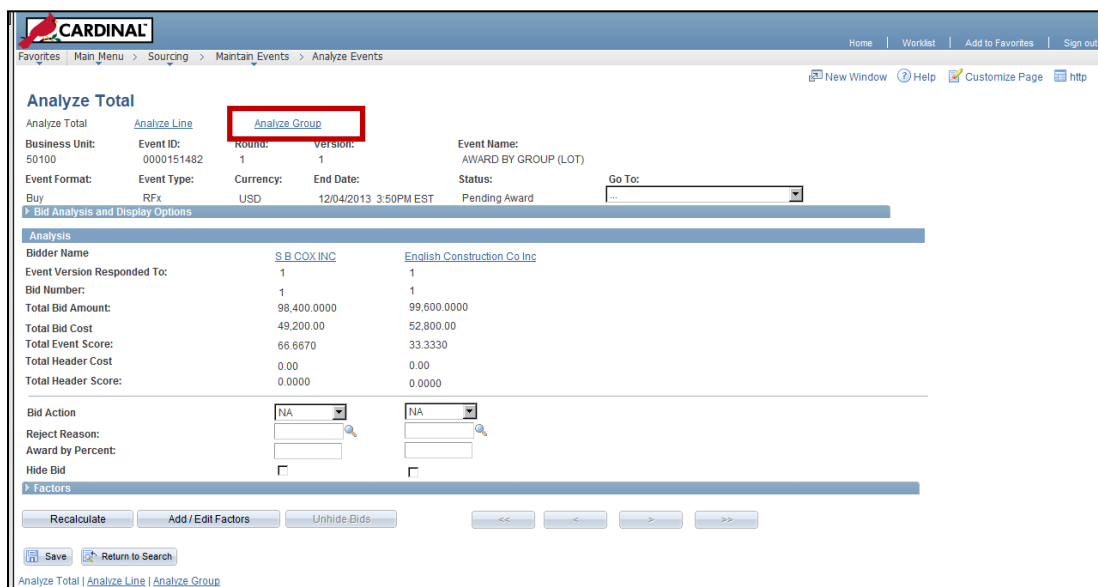
42 Bid processing is complete.

Analyze Bids & Award Event – By Group (Lot)

Once an event's **End Date** has passed, i.e., **Status = Event Completed**, and all the bids have been entered, using the **Event Workbench** you can navigate to the **Analyze Total** page where you can review the bids. Bids are considered and awarded based on the line items within the **Group**.

43 You can navigate to the **Event Workbench** page using the following path and follow normal procedures to analyze an event:

Main Menu > Sourcing > Maintain Events > Event Workbench



Analyze Total

Analyze Line **Analyze Group**

Business Unit: 50100 Event ID: 0000151482 Round: 1 Version: 1 Event Name: AWARD BY GROUP (LOT)
 Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 3:50PM EST Status: Pending Award Go To:

Analysis

Bidder Name	S B COX INC	English Construction Co Inc
Event Version Responded To:	1	1
Bid Number:	1	1
Total Bid Amount:	98,400.0000	99,600.0000
Total Bid Cost:	49,200.00	52,800.00
Total Event Score:	66.6670	33.3330
Total Header Cost:	0.00	0.00
Total Header Score:	0.0000	0.0000

Bid Action: NA NA
 Reject Reason:
 Award by Percent:
 Hide Bid: ☐

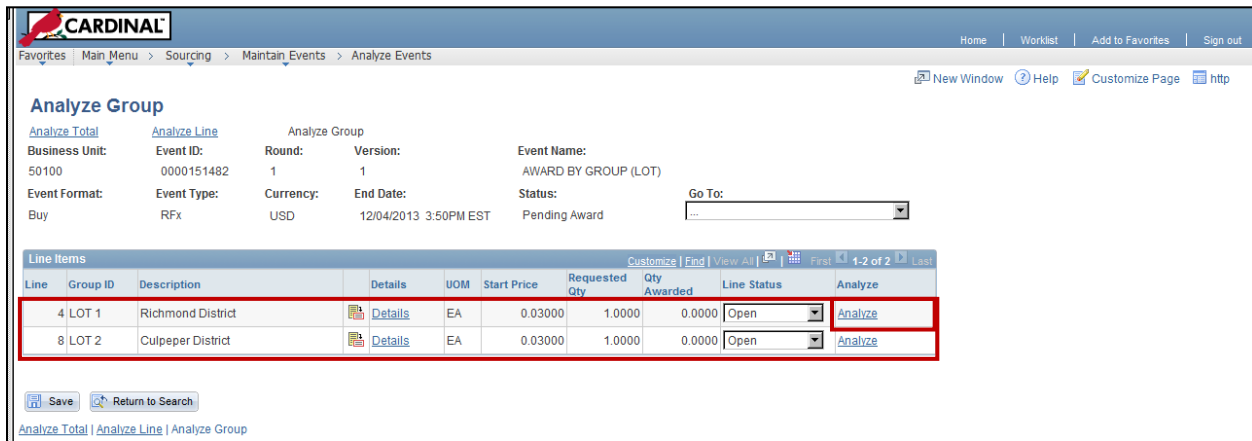
Factors

Recalculate Add/Edit Factors Unhide Bids

Save Return to Search

44 From the **Analyze Total** page, click on the **Analyze Group** hyperlink. The **Analyze Group** page displays.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Analyze Group

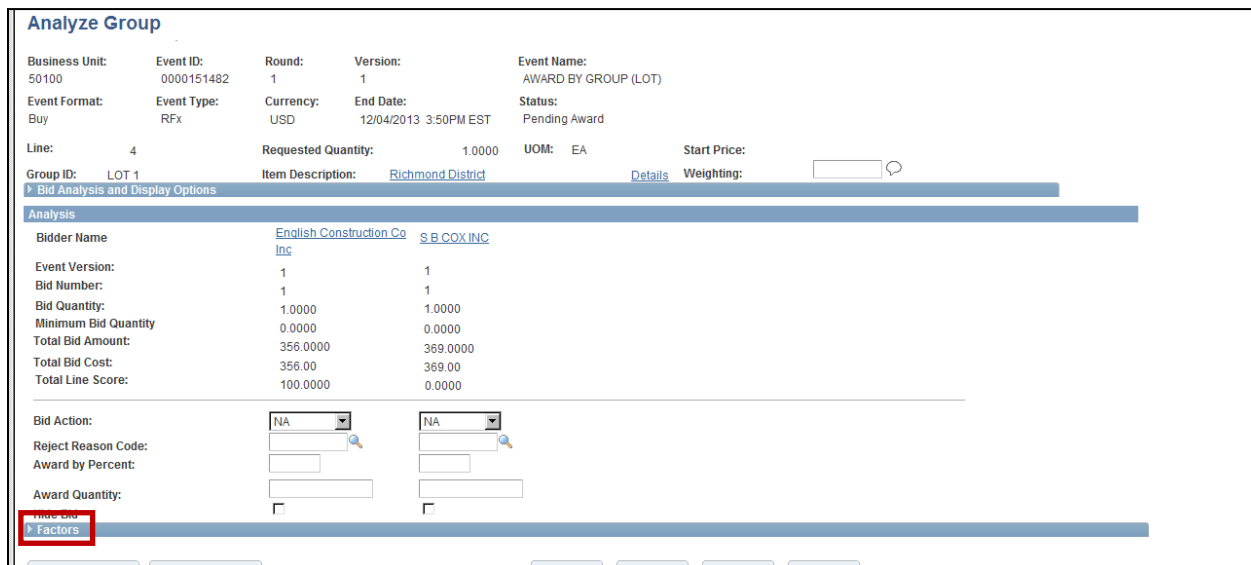
Business Unit: 50100 Event ID: 0000151482 Round: 1 Version: 1 Event Name: AWARD BY GROUP (LOT)
 Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 3:50PM EST Status: Pending Award Go To:

Line	Group ID	Description	Details	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
4	LOT 1	Richmond District	Details	EA	0.03000	1.0000	0.0000	Open	Analyze
8	LOT 2	Culpeper District	Details	EA	0.03000	1.0000	0.0000	Open	Analyze

[Save](#) [Return to Search](#)

[Analyze Total](#) | [Analyze Line](#) | [Analyze Group](#)

- 45** Click on the **Analyze** hyperlink next to each **Group ID**, e.g., **Group ID = Lot 1**, you wish to award. Another **Analyze Group** page will display and details the extended bid response. The **Analyze Group** page is displayed and shows the **Group / Lot total per bidder**.



Analyze Group

Business Unit: 50100 Event ID: 0000151482 Round: 1 Version: 1 Event Name: AWARD BY GROUP (LOT)
 Event Format: Buy Event Type: RFX Currency: USD End Date: 12/04/2013 3:50PM EST Status: Pending Award

Line: 4 Requested Quantity: 1.0000 UOM: EA Start Price:
 Group ID: LOT 1 Item Description: [Richmond District](#) [Details](#) Weighting:

[Bid Analysis and Display Options](#)

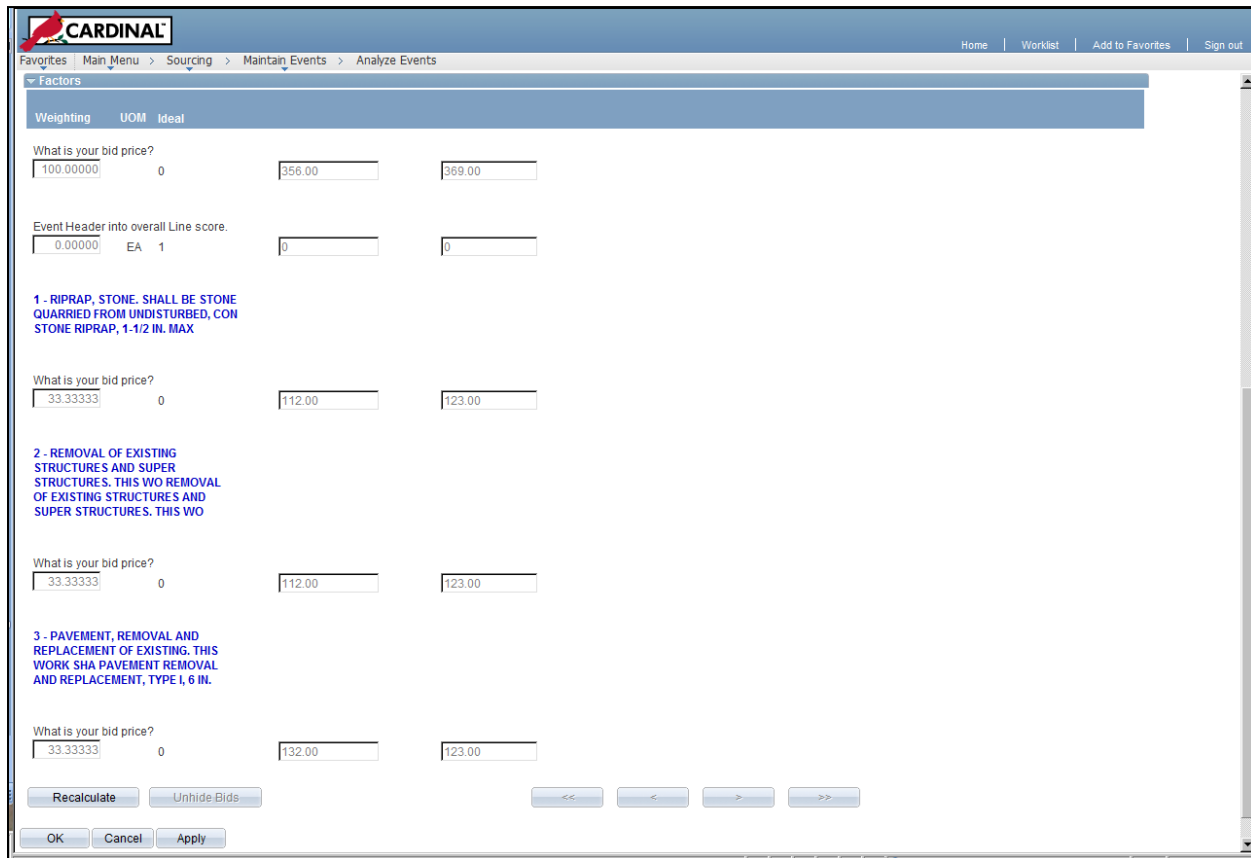
Analysis

Bidder Name	English Construction Co Inc	S B COX INC
Event Version:	1	1
Bid Number:	1	1
Bid Quantity:	1.0000	1.0000
Minimum Bid Quantity	0.0000	0.0000
Total Bid Amount:	356.0000	369.0000
Total Bid Cost:	356.00	369.00
Total Line Score:	100.0000	0.0000

Bid Action: NA NA
 Reject Reason Code:
 Award by Percent:
 Award Quantity:

[Factors](#)

- 46** Click on the arrow next to the **Factors** section to review the bid factors.



CARDINAL

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Sourcing > Maintain Events > Analyze Events

Factors

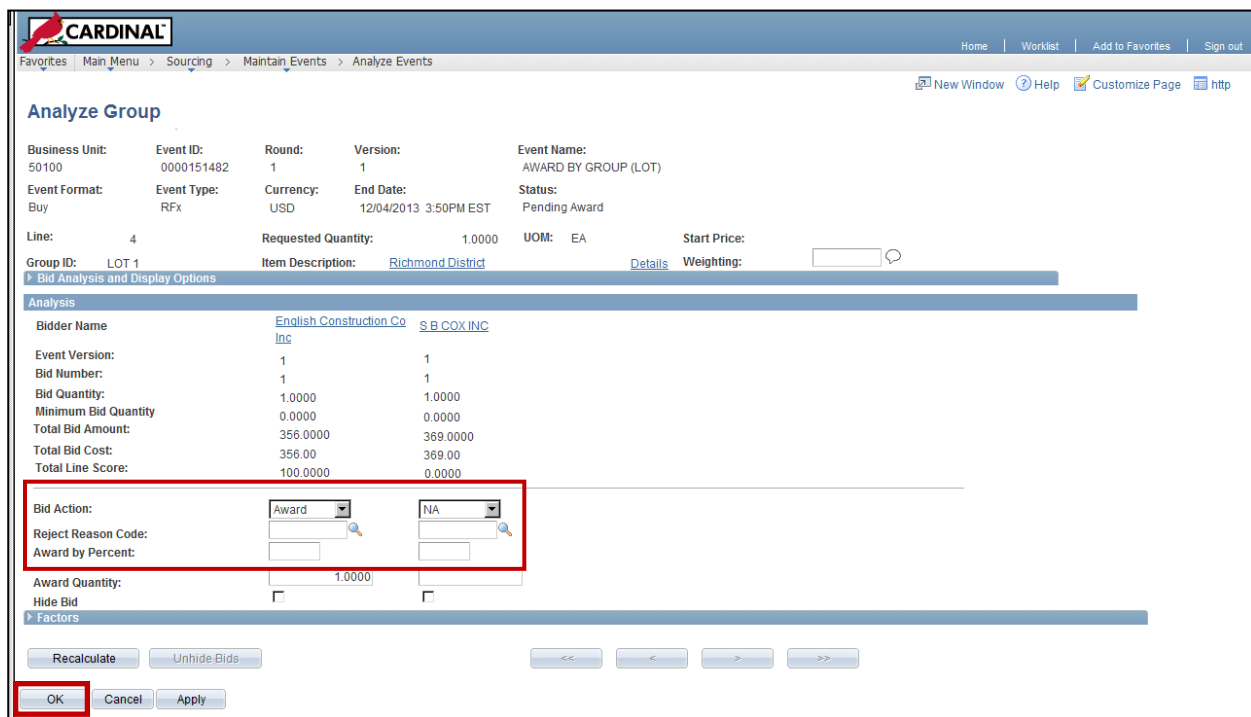
Weighting	UOM	Ideal
What is your bid price?		
100.00000	0	356.00
Event Header into overall Line score.		
0.00000	EA 1	0
1 - RIPRAP, STONE. SHALL BE STONE QUARRIED FROM UNDISTURBED, CON STONE RIPRAP, 1-1/2 IN. MAX		
What is your bid price?		
33.33333	0	112.00
2 - REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO REMOVAL OF EXISTING STRUCTURES AND SUPER STRUCTURES. THIS WO		
What is your bid price?		
33.33333	0	112.00
3 - PAVEMENT, REMOVAL AND REPLACEMENT OF EXISTING. THIS WORK SHA PAVEMENT REMOVAL AND REPLACEMENT, TYPE I, 6 IN.		
What is your bid price?		
33.33333	0	132.00

Recalculate Unhide Bids

OK Cancel Apply

47 Review the details. Scroll back up to the **Analysis** section to make the award for this **Group**.

Strategic Sourcing – Bid Factors, Weights & Score / Event Awards



Analyze Group

Business Unit: 50100 Event ID: 0000151482 Round: 1 Version: 1 Event Name: AWARD BY GROUP (LOT)
 Event Format: Buy Event Type: RFx Currency: USD End Date: 12/04/2013 3:50PM EST Status: Pending Award

Line: 4 Requested Quantity: 1.0000 UOM: EA Start Price:
 Group ID: LOT 1 Item Description: Richmond District Details Weighting:

Bid Analysis and Display Options

Analysis

Bidder Name	English Construction Co Inc	S B COX INC
Event Version:	1	1
Bid Number:	1	1
Bid Quantity:	1.0000	1.0000
Minimum Bid Quantity	0.0000	0.0000
Total Bid Amount:	356.0000	369.0000
Total Bid Cost:	356.00	369.00
Total Line Score:	100.0000	0.0000

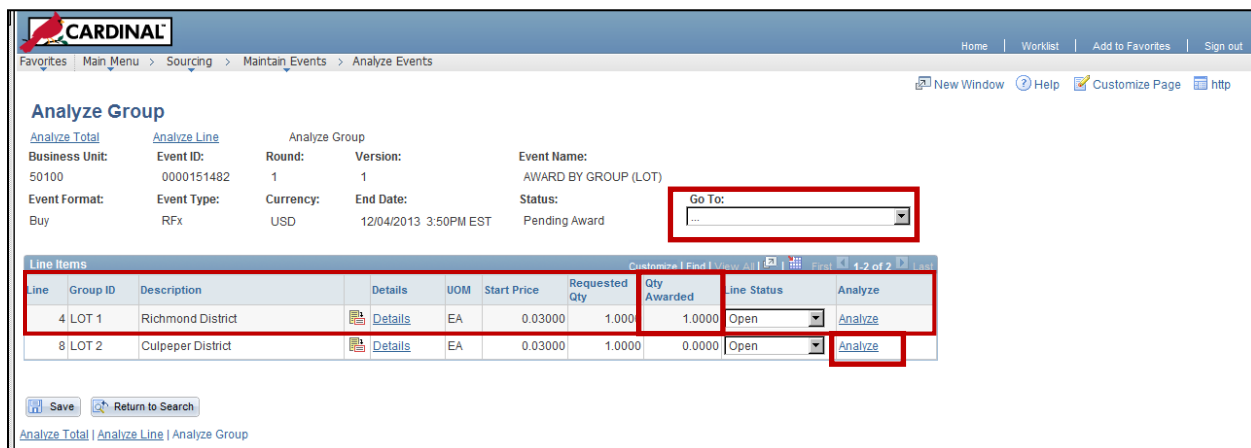
Bid Action: Reject Reason Code:
 Award by Percent:
 Award Quantity:
 Hide Bid: ☐

Factors

Recalculate Unhide Bids

OK Cancel Apply

48 When complete, click **OK**. The **Analyze Group** page is displayed.



Analyze Group

Business Unit: 50100 Event ID: 0000151482 Round: 1 Version: 1 Event Name: AWARD BY GROUP (LOT)
 Event Format: Buy Event Type: RFx Currency: USD End Date: 12/04/2013 3:50PM EST Status: Pending Award

Go To:

Line Items

Line	Group ID	Description	Details	UOM	Start Price	Requested Qty	Qty Awarded	Line Status	Analyze
4	LOT 1	Richmond District	Details	EA	0.03000	1.000	1.0000	Open	Analyze
8	LOT 2	Culpeper District	Details	EA	0.03000	1.0000	0.0000	Open	Analyze

[Save](#) [Return to Search](#)

[Analyze Total](#) | [Analyze Line](#) | [Analyze Group](#)

49 The **Qty Awarded** on the **Group ID** of **Lot 1** is populated.

50 Repeat the process to award all remaining **Groups** / **Lots**.

51 When all **Lots** have been awarded, click **Save**.

52 From the **Award Details** page you will make the award to the PO or contract. You can navigate to the **Award Details** page using the following path: **Main Menu > Sourcing > Maintain Events > Award Events**. You can also access this page from the **Analyze Group** page by clicking on the drop-down arrow in the **Go To** box, and selecting **Award Events**. The **Award Details** page displays. Follow procedures to make the award to PO or contract using the steps noted above.